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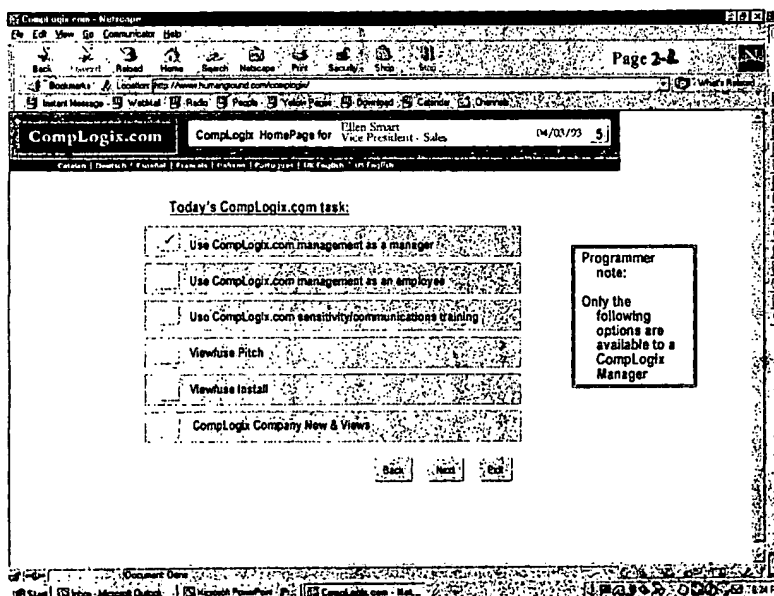
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- (71) Applicant: **COMPLOGIX, INC.** [US/US]; Suite 200,
101 South Franklin Street, Tampa, FL 33602-5350 (US).
- (72) Inventor: **CASWELL, John, B.**; 3435 Bayshore Boulevard #1500, Tampa, FL 33629-8889 (US).
- (74) Agents: **STEIN, Stefan, V. et al.**; Holland & Knight LLP,
Suite 2300, 400 N. Ashley Drive, Tampa, FL 33602 (US).
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(54) Title: **METHOD FOR EFFECTIVE MANAGEMENT OF EMPLOYEES**



(57) Abstract: The present method of managing a business includes allowing access to an Internet-based management system as either a manager or an employee for training and communication purposes to provide an effective working environment:

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METHOD FOR EFFECTIVE MANAGEMENT OF EMPLOYEES
CROSS-REFERENCE TO RELATED APPLICATIONS

This is a continuation of provisional patent applications 60/161,813, filed October 27, 2000 and 60/192,993, filed March 28, 2000, the disclosures of which are hereby incorporated by reference herein. Further, the disclosure of the U.S. patent application filed concurrently herewith is hereby incorporated by reference herein.

Field of the Invention

This invention relates to methods for effective management of employees.

Description of the Background Art

There are three sides to the problem of ineffective management. First, there is little known effective training in the management of individuals. The second side of ineffectual management deals with the stereotypes and traditional notions regarding the manager/employee relationship. The third part of the ineffective management problem lies with the present day reality: managers need their people more than the people need the manager.

An effective system of individual management is needed. This need is greater as the respect and need for labor is greater. The industrialized, western world will need a new system of individual management before Asia or South America where labor is plentiful and inexpensive, that is to say, where a slow or unproductive employee can be easily replaced.

SUMMARY OF THE INVENTION

For the purpose of summarizing this invention, the invention comprises a method for the effective management of employees. The presumed "market target" for invention is the manager; however, the invention is a complete system for managing the time of the management process and creating effective communications through a genuine "partnership with accountability."

In addition to managers, the invention is applicable to three further groups: outside board of director members, instructors (in individual management and in their role as faculty advisors) and students (both as candidates for a management degree and as advisees working with their faculty advisor).

In addition to the manager's needs in the management process noted above, the invention facilitates "sensitivity training" and "communications improvement". The invention's methodology incorporates the philosophy and psychology needed to be a system of constructive communication, and with regular use, it trains the user in turning almost any workplace confrontation into a positive dialogue. In this regard, most managers' probable strengths are also their possible weaknesses, and these usually become apparent in communications failures.

A more complete description of best practices can be found in the companion book Human Ground - Management Through a Partnership With Accountability, the disclosure of which is hereby incorporated by reference herein.

The invention's philosophy and psychology are based on what are considered "best practices" by successful managers,

researchers and organizations. The invention brings together such best practices in a novel way into a workable system that resolves or at least finesses individual weaknesses, establishes effective communications and takes less time than traditional management.

The invention is Internet-based because, by 1999, ten percent of all employment involved the Internet by job seekers, employers or both and it is estimated that by year 2005, an astonishing ninety-percent of employment related practices will involve the Internet.

Furthermore, the Internet is presently the most economical way to deliver the Invention's method; however, it should be understood that the invention may be deployed using CD-ROM or floppy disks. Notwithstanding, the Internet is the most preferred implementation of the invention because it currently offers both security and quality control not offered by any other medium. For the client, a virus and disaster protected server is safer and more reliable than externally loaded devices. Security also includes assurance that only authorized users have access and that information and data is not lost.

Finally, for successful implementation of the invention, quality control is an important goal. Clearly, a website can be changed and updated quickly and economically. Refreshing the website's look and feel will be an on-going activity. Thus, it shall be understood that, without departing from the spirit and scope of the invention, each web page described hereinafter may vary from time to time, but with the same general purpose and functionality. In addition, proprietary information such as the Pitch and Install websites are better

protected from misuse, piracy and plagiarism than if these programs were available on each associate's laptop computer in a PowerPoint or other presentation format.

BRIEF DESCRIPTION OF THE DRAWINGS

For a fuller understanding of the nature and objects of the invention, reference should be had to the following detailed description taken in connection with the accompanying drawings in which:

Figs. 1-1 through 1-2 illustrate the Languages and Prospective Users web pages showing how different languages are accessed and used, and a page for each prospective user of the invention to showcase the product;

Figs. 2-1 through 2-12 illustrate the Registered Users Enter Here (1) web pages showing various Users' sign-ons and a detailed illustration of the first 3 of a Manager's 10 Preferences;

Figs. 3-1 through 3-18 illustrate the Registered Users Enter Here (2) web pages with a detailed illustration of a Manager's Preferences 4 - 10;

Figs. 4-1 through 4-12 illustrate the Registered Users Enter Here (3) web pages including the options for an Instructor or a person seeking improvement in sensitivity or communications as well as a demonstration of an employee's use of the website;

Fig. 5-1 illustrates the Cost, Guarantee web page;

Fig. 6-1 illustrates the Become a Registered User web page;

Fig. 7-1 illustrates the Investor Information web page;

Fig. 8-1 illustrates the Employment Information web page;

Figs. 9-1 through 9-3 illustrate the "CompLogix" web pages the rationalized approach to salaries and wages;

Fig. 10-1 illustrates the Management IQ web pages, an interactive and informative quiz;

Fig. 11-1 illustrates the Email us and Book Order (*Human Ground*) web page;

Fig. 12-1 illustrates the Useful Links web page to personnel and management websites such as labor lawyers, employee selection consultants, etc.;

Fig. 13-1 illustrates the Pitch web page is the non-interactive website used by personnel when presenting the program to a prospective user; and

Fig. 14-1 illustrates the Install web page including the non-interactive website used by personnel when installing the program with a new user.

DETAILED DESCRIPTION OF THE PREFERRED EMBODIMENT

For ease in description, the invention is generally referred to as "CompLogix". The various groups of Figures are described in detail as follows:

Fig. 1 - Languages and Prospective Users Web Pages

Fig. 1-1 illustrates the CompLogix.com HomePage. There are ten options plus a large button in the center for prospective users. The dark bar below the CompLogix.com logo lists seven languages. More languages will be added in the future.

In Fig. 1-2, there are seven categories of prospective users shown. Clicking on any one of them will take the User to the site that explains the benefits and advantages of the CompLogix service. At the top of the screen, under the CompLogix logo, the ten HomePage options are listed, and these options are all available from any page in the "Info for Prospective Users" series of screens. Note here "Managers - Using CompLogix to Manage" has been selected. This will take us to that screen.

Fig. 2 - Registered Users Enter Here (1)

It is noted that there are three groups of Figures titled "Registered Users Enter Here". Together they comprise all options available to a Registered User. For clarity, however, the functions have been distributed among three groups of Figures.

The User must enter an identification number and password. There is also provision for changing the password and phoning the CompLogix HelpDesk. Whenever an ID and password are correctly entered (i.e., the CompLogix computer

recognizes the User), the CompLogix program knows where this User has the right to go in the website, what functions s/he has the right to perform. The CompLogix website recognizes this User as a Consultant for the company CompLogix, Inc. The User has selected "Next" to progress to the next screen.

Fig. 2-1 illustrates the only items a CompLogix Consultant can do. The Programmer note tells us to refer to the billing descriptions for information on "View/Use Pitch" and "View/Use Install". Here, the CompLogix Consultant has selected "Use CompLogix.com management as an employee" and "Next" to advance to the next screen. "CompLogix Company New & Views" will give associates a bulletin board of happenings within the company, external news that affects the company and a list of standing company record waiting to be broken (both sales and tele-trainer records).

As shown in Fig. 2-2, Managers are also employees of CompLogix and may also act as Consultants. When logging onto the CompLogix website, the User has to identify in what capacity s/he is entering the website. S/he cannot enter in one capacity and go to another capacity without exiting the website and re-identifying themselves in another capacity. In this way, a Manager cannot enter as a Manager and change their Employee records; their User privileges are controlled. In this example, the User has selected "Use CompLogix.com management as a manager" and "Next" to advance to the next screen. "CompLogix Company New & Views" will give associates a bulletin board of happenings within the company, external news that affects the company and a list

of standing company record waiting to be broken (both sales and tele-trainer records).

In Fig. 2-6, the User logs on as an Instructor in a Business School or the training department of a large organization. S/he would not log on as an independent consultant because of CompLogix's quality control/training requirements and because there is no economic incentive for an independent consultant to work with the website in this manner. S/he selects "Next" to advance to the next screen.

Fig. 2-3 lists the six options available to an Instructor. Instructors are employees of an institution and as such, may be using CompLogix as an employee or even a manager/supervisor. Here, the Instructor selects "Use CompLogix.com management as a manager", then s/he selects "Next" to advance to the next screen.

Students only have access to Assignments emailed to them by an Instructor. The ID/Password takes the student directly and only to that Assignment. Note: As will be seen in the Being a Registered User section, we will see that a Student's access is also limited to the few months of a term or semester.

The website may recognize a User as an Outside Director or Trustee of an organization. This privilege was established by a registered Manager/User of this organization.

Fig. 2-4 illustrates the only four options available to a non-CompLogix manager. This manager selects "Use CompLogix.com management as a manager".

Fig. 2-5 shows the composition of the ID bar after the CompLogix.com logo. This serves as positive identification of

the User, a reminder of the way information is recorded in the CompLogix website memory: name, title, StartDate (first date of employment with this organization) and number of people reporting to this manager (5). Here we see the ten Options all new Users will want to set up. Here, too, is where Options are changed from time to time.

In Fig. 2-6, the User/Manager selects the first Option, Preferences. All new Users will want to set up Preferences here, and change them from time to time. This User has also selected the first item of Preference Level 2, "1-1 Alerts" which has taken her to Preference Level 3, "1-1-1 Up-Coming Reviews". The box overlaid at the lower left of the screen shows the 3 alerts for up-coming reviews. This User wants to be alerted one week prior to the date of an up-coming review. Note that throughout this document, the options and preferences selected will be the default settings, that is, CompLogix's preferred setting.

In order to track the progress of her employees in completing an assignment to author an organization Mission statement, a User may want to receive an email (from the CompLogix Site Administrator) when 90% of the participants have responded (or at least visited the Mission setting website). When this occurs, this User will feel comfortable about beginning the development of a bottoms-up mission.

Unlike Mission and Goal assignments in which the Manager can know who has responded, how and when, the employee attitude survey (called "M&M" in CompLogix, meaning "Employee Morale and the Employee's Assessment of the Quality of Management) is anonymous. The User sets a

preference to be alerted when 75% of her employees have visited the M&M site for this particular assignment.

A Manager may be sending Employees assignments periodically. She indicates a preference that Employees who have not responded to an assignment request be reminded three days before the Close Date (the date when the exercise closes, the cut-off date, the due date), and daily thereafter.

Some emails and alerts are sensitive, some ordinary or routine. The User may register a preference as to the number of levels up in the organization chart copies of emails should go, and also how frequently alerts should be sent to Higher-Ups. If Higher-Ups in a large organization were to receive copies of all CompLogix emails every day, they could easily be overwhelmed. The User may indicate that copies of emails should be sent one level up (i.e., to her boss), and only on Fridays. This means that on Fridays, her boss would be notified of all overdue and coming due Progress Reviews as well as exchanges of emails dealing with Progress Reviews and other items.

Standard greetings may be programmed into CompLogix.com to recognize an Employee's anniversary with the organization. These annual greetings change from year to year and are suitable for men or women; they are "politically correct" and designed to boost morale. Greetings can be changed to suit the special needs of the manager or the employee.

In Fig. 2-7, this Level 3 preference allows the User to automatically convert the present (probably annualized) pay system to the CompLogix-recommended system of building more importance into the employee's anniversary with the

organization (and spreading pay increases throughout the year so they don't all "hit" in January) by having annual pay increases coincide with the anniversary date.

Some emails and alerts are sensitive, some ordinary or routine. The User registers a preference as to the number of levels up in the organization chart copies of emails should go, and also how frequently alerts should be sent to Higher-Ups. If Higher-Ups in a large organization were to receive copies of all CompLogix emails every day, they could easily be overwhelmed. The User moves to Level 2 Preferences, "1-3 E-mails", then Preference Level 3, selecting "1-3-1 E-mail copy level." User indicates that copies of emails should be sent one level up (i.e., to her boss), and only on Fridays. This means that on Fridays, her boss would be notified of all overdue and coming due Progress Reviews as well as exchanges of emails dealing with Progress Reviews and other items.

In Fig. 2-8, the User selects "1-3-2 Edit/compose std e-mails". The box right below that command appears, listing the standard e-mails. User selects "Company Anniversary" and the larger box (Dear <<Salu>>) appears with the standard text for this e-mail. As indicated, User may edit, customize yearly (a popular choice that comes with a reminder to the manager a week ahead of the anniversary) or have CompLogix use its own random greetings, on time, each year.

In Fig. 2-9, preference Level 2, option 4 is "1-4 Include my prior Mission", Yes or No. When doing an exercise in creating a new Mission, employee's efforts will be sent to a "CompileSite" where the manager will synthesize them into

one, bottoms-up Mission for the group. The selected option (also the default recommendation) instructs CompLogix.com to include the existing Mission in the future Mission exercise, so as not to lose track of the present Mission and so that the next Mission is not too far removed from the existing Mission (we are advocating evolution, not revolution) - although the new Mission can be whatever the manager wishes.

"1-5 Allow use of my Mission(s)", allows this manager's present and past Missions to go to a Master Mission Site where then can be viewed by other managers. The Manager may include those Missions in his own CompileSite when next running the Missions exercise.

The Manager to the Master Mission Site allows selection of one or more Missions from other parts of the organization to be sent to his Compile Site for inclusion in his own next Mission compiling exercise.

The User may select the manner in which their annual CompLogix site access license is to be handled.

The Client may discontinue use of the CompLogix.com website and service. As noted, if the User confirms his desire to discontinue use of the website, he will always have access to data, but may not enter new data; in addition, the e-mail functions are stopped. A disenabled User may only resume use through CompLogix headquarters via telephone. An ex-client may not visit the website and self-resume the service. An ex-client may inscribe as a new client, with appropriate fees charged.

As illustrated in Fig. 2-10, we are inscribing the initial group of employees.

1. User fills in the blanks: name, "salu" (to be used as the Salutation in e-mails), StartDate (of employment with this organization), birthdate and e-mail address. Note that the e-mail address has a suffix, "clx". This is done to distinguish the CompLogix e-mail from ordinary e-mail. Only in this way can a User send e-mail received from ordinary e-mail to his CompLogix e-mail site.

2. Following the e-mail address box is a small box. This should be marked if this employee manages or supervises any other employee. This information helps CompLogix develop organization charts for clients, as well as monitoring the breadth of use of CompLogix.com in an organization.

3. In future visits to this page, to make assignments, for example, User may select All or in the boxes to the right of each employee's registration field, select individual employees.

4. When User has entered all the initial employees (all in the group, or all to be entered in this session), select Next. Simultaneously, in the header, the total number of registered employees appears. This is especially useful if there are more than eight employees, and some will appear below the field of vision.

When a sixth (new) employee is added.

1. Payroll governance needs to be alerted.

2. When User selects Next, the number of participants/employees indicated in the header is adjusted to show the new census.

As shown in Fig. 2-11, we will see the way a Manager assigns a CompLogix exercise to an employee:

1. Click on the dotted line around the box called "Mission Statement" to view prior/current Mission Statements.

2. There are only four possible assignments: Mission Statements, Goal-Setting, M&M and Exit Interview. The way to set one up is to assign a CloseDate under the name of the exercise wanted. If a Manger wanted to have employees work on the next set of Goals, s/he would decide when that exercise should be complete and assign the CloseDate under the name of the exercise.

3. The next step is to indicate which employees are to participate in the exercise by selecting "All" or clicking the appropriate box next to the name of the employee desired.

4. Finally, employees need to be notified of the exercise. This is done by selecting a CompLogix email, or composing an original email.

There are only four possible assignments: Mission Statements, Goal-Setting, M&M and Exit Interview. The way to set one up is to assign a CloseDate under the name of the exercise wanted. Here a Manger wants to have employees work on the next Mission. S/he decides when that exercise should be complete and assigns a CloseDate under the name of the exercise (mm/dd/yyyy becomes 05/15/2000). The next step is to indicate which employees are to participate in the exercise by selecting "All" or clicking the appropriate box next to the name of the employee desired.

Employees need to be notified of the exercise. This is done by selecting a CompLogix email, or composing an original email.

As illustrated in Fig. 2-12, the only exercise in CompLogix.com available to Outside Director and Trustees is M&M, the morale and quality of management survey. Inscribing Outside Directors/Trustees follows a logical pattern of steps.

1. Enter the director's (or trustee's) name, "salu" (salutation, the name used in email to greet this person), and email address.

2. Select the participants to complete the survey by selecting "Announce exercise to all ("write") or clicking the "write" button after each selected director's name. Then, select the participants to read the reports of this and prior surveys by selecting "Send report to all ("read", meaning send all selected "read" participants email notification that the report(s) are available to read on the internet, or click the "read" button after each selected director's name.

3. Write in the date you wish the notifying email to be sent to those who will "write".

4. Write in the date this exercise will end, the CloseDate

5. Write in the total percent of inscribed directors needed to notify all authorized to "read" that the report(s) are ready.

6. Write Select "back", "next" or "exit" to move from this page.

Fig. 3 - Registered Users Enter Here (2)

Fig. 3-1 illustrates the CompLogix.com HomePage. The User has selected "Registered Users Enter Here".

In Fig. 3-2, after logging in with ID and password, the User finds himself in Fig. 3-2. S/he selects option "4 Compile

Missions (1-800-656-7117)". The phone number will allow North American clients and CompLogix Consultants to talk to an experienced "tele-trainer" at CompLogix headquarters, to assist them with the compiling of Missions and to work with goals. Earlier, we saw how a Manager assigned the Mission exercise to an Employee. Suffice it to say that the Employees who report to this Manager have individually written their versions of the organization's Mission and upon Saving their work, it has been sent to a CompileSite. It is that CompileSite the Manager will now visit in order to compile the individual Employees' Missions into one bottoms-up (Employee-authored) Mission for the organization. As regards the request to compile a Mission, the User will be taken directly to the one, open CompileSite for his or her Employees.

In Fig. 3-1, we see the Mission efforts of five Employees; the last Mission seen here is actually the existing Mission of this organization. In establishing Preferences, this Manager has asked that the existing Mission be included in any new Mission exercises. Note at the bottom the Manager can grant or deny access to the Mission work done by the Employees as well as the compilation of the many Missions into one. In the right hand column, we see a reminder of the toll-free tele-trainer help referred to earlier. We also see the various editing functions that will allow the Manager to underline words that comply with Mission-setting criteria, words that repeat because many Employees feel they express the purpose of the business. At the same time, the Manager can strike-through ideas that are inconsistent with the Mission-setting criteria. The "Refresh" button

In Fig. 3-2, the Manager uses the various editing functions that will allow him or her to underline words that comply with Mission-setting criteria, as well as words that repeat because many Employees feel they express the purpose of the business; the Manager also strikes-through ideas that are inconsistent with the Mission-setting criteria. The "Refresh" button immediately changes this page number from 1 to 2. Initially, the page is shown as "page 2 of 2", but the total number of pages changes to reflect the actual total number of pages.

As illustrated in Fig. 3-3, the "Refresh" button deletes the words with strike-through, leaving blank spaces. Hitting the Refresh button again

In Fig. 3-4, the Manager uses the Select and Delete keys to eliminate redundancies. Text is Selected and Pasted so that it reads comfortably. Hitting the Refresh button again brings us to page 4 of 5. More selecting, cutting and pasting further condenses the remaining words into one, coherent Mission that satisfies the five Mission-setting criteria.

As illustrated in Fig. 3-5, in the end, the final Mission emerges. It is genuinely the bottoms-up work of the Employees. When they read the compile sheet and the final Mission, they will recognize their contribution. Giving Employees "equity" in the Mission is a psychologically critical step to the CompLogix process. In fact, CompLogix will not work with a client who short cuts or short circuits the process of giving Employees equity in the Mission. The Manager selects "Save" and the email that appears on the

screen is set to deliver the Mission to the participants and to announce the next exercise, bottoms-up goal writing.

As illustrated in Fig. 3-6, by way of example, the Manager selects the first Employee, Robert MacNamara. Selecting "Next" progresses the Manager to the next screen.

Ideally, the work done on the next few Figs. are done with the Manager and Employee together, perhaps shoulder-to-shoulder in front of the Manager's computer monitor, to have a dialogue, to discuss the criteria and to ensure that the final list of goals are the goals of the Employee.

As illustrated in Fig. 3-7, goal 3 is not mission-compatible and probably unrealistic. It is deleted upon hitting the Refresh button. Remaining goals are re-numbered.

Old Goal 4 (new Goal 3) is not mission-compatible, worthy or growth-oriented. It is deleted upon hitting the Refresh button. Remaining goals are re-numbered.

New Goal 3 has not been quantified. Lack of quantification makes progress reviews subjective and that means reviews are potentially confrontational and time-consuming. Manager and Employee discuss this goal and together they decide on a hiring date and a qualification date. This data is entered into the website.

As illustrated in Fig. 3-8, following further discussion regarding the Employee's tardiness and lack of participation in sales meetings, the Manager and Employee agree that for the sake of other Employees' morale, fairness and good business practice, the Employee himself wants to improve in this area. After some additional discussion, a new Goal 4 is written. When Save is selected, this document is saved to

the employee's CompLogix personnel file and the goals are incorporated into a form called the Progress Review.

The reviewer enters his initials ("RTF") and the actual review date (April 7, 1999). After Goal 1, "result", the Reviewer enters "M", meaning "Met expectations". The next box, marked "em" (for e-mail) means the Reviewer wants to send an email at this point of data entry into the Progress Review form. Sending an email for comment on an "m" result is voluntary on the part of the Manager. In this case, the Reviewer wants to send an email, and it is seen on this screen. If a Result is ever "b" (below) or "e" (exceeded), the Reviewer must write an explanatory email to the Employee. A copy of the email, along with all other work, forwarded items (some with attachments) and emails will reside permanently in the employee's CompLogix personnel file. "Next" advances the Reviewer to the next page.

In Fig. 3-9, the screen shows the results of the balance of the first review and the results of the beginning of the second review (July 14, 1999). Note that the result of Goal 4 is met, and again, the Reviewer elects to send an email.

In Fig. 3-10, an email announces the completion of a goal and requests the Employee's participation in developing a replacement goal.

Fig. 3-11 illustrates that as an example of the interactivity and helpfulness of M&M Report 1, the Manager, noticing overall poor scores for Question 10, clicks on the number for Question 10 and the original question appears.

As illustrated in Fig. 3-12, clicking on the repeated question, a suggestion as to discovering and implementing activities that should result in a higher score with the next

M&M exercise. There are discovery and implementation suggestions for each of the 24 questions. The questions as well as the discovery and implementation suggestions are changed and upgraded as better information becomes available.

Fig. 3-13 illustrates M&M Report 2, Report by CloseDate. In this example, one can readily see the progress made overall, 17.2% since the original exercise, sometime in early 1997.

As illustrated in Fig. 3-14, if the Manager selects "By Date" and "All", a long list appears. This list also shows the EndDate of terminated Employees.

As illustrated in Fig. 3-15, a blank email appears because one cannot de-activate an employee without explanation. This email will be lodged permanently in the Employee's CompLogix personnel file.

Apparently, this Employee departed under good circumstances because the Manager has allowed her an Exit Interview (see bottom on screen). Note the PN (Programmer note) indicating the number of active employees has been reduced from six to five.

As illustrated in Fig. 3-16, an automatic/required email occurs in which Employees are assigned to the newly promoted Manager.

As illustrated in Fig. 3-17, manager follows the instructions: "Enter Name of new manager". Manager enters "Adamms, E". Because Employees can come from a wide distribution around the organization and because a starting group is usually less than ten, the senior Manager is required to write in the names and StartDates of Employees

being transferred to a new or existing Manager. Names are then selected and the "To" button selected to make the transfer. Automatically, Employees are deleted from the roster of their prior Manager. Prior Managers will be notified, as well as the new Manager, transferees and Payroll Governance, in short, "Interested Parties", by email.

Fig. 3-18 is an illustration of the email referred to in the last paragraph of Fig. 3-37.

Fig. 4 - Registered Users Enter Here (3)

As illustrated in Fig. 4-1, an Instructor may use CompLogix.com as an Employee of his or her institution; s/he may also supervise a secretary, research assistant, other staff, and in this capacity, he may be a Manager. As a Manager, s/he may prescribe sensitivity/communications training for a subordinate. Or, as a faculty member, s/he may use CompLogix.com when acting as a Faculty Advisor to a student. Or, as a faculty member, s/he may wish to research CompLogix assignments for students, view and grade students' work. These are the seven options presented to the Instructor on Fig. 4-1. We have already seen how an Instructor might use CompLogix.com as an Employee, Manager, or Manager assigning sensitivity or communications training.

As illustrated in Fig. 4-2, the Instructor identifies the class or course for which s/he is inscribing students, using the institution's course catalogue number. In the example, the course number is M-104. The Instructor identifies the term or semester this course and list of Students pertains to. In the example, the semester this class pertains to is "Aug/Dec 2000", which will re-appear as "8-12/2000".

The course and term numbers together, "M-104/8-12/2000", become the identifying number in the URL that will appear in an email notifying Students of an assignment.

As the Instructor enters the last name, first initial (or "N") and middle initial (or "N"), the CompLogix.com site assigns a password to each student (see Fig. 4-5).

As illustrated in Fig. 4-2, the list of names and passwords needs to be communicated to the Students. This is done by printing the list of names and passwords. Printing is designed to fit on Avery labels #5162. Instructors are discouraged from posting the names and passwords, to minimize other Students from using another Student's password thereby abusing the CompLogix.com system. The Instructor selects "Next" to advance to the next screen.

The CompLogix.com website needs to know what the Instructor wants to do. He selects "View/select new assignments" and "Next" to proceed to the next screen.

There are five different assignments from which the Instructor may select. Here he Selects "Missions". The purpose here is to train the Student in identifying elements of a Mission Statement that do not comply with CompLogix Mission criteria, to learn the editing techniques of underlining, strike-through, refresh, cut, copy and paste, all resulting in a revised Mission that does comply with the criteria.

A schedule of Mission Assignments appears. Mission Assignments are arranged alphabetically by industry. Mission Assignments (including industry) are drawn from actual field experiences of CompLogix Consultants. Therefore they change frequently. This Instructor selects "Heavy

Manufacturing 102 09/98" (the date 09/98 is the date this Mission Assignment was posted on CompLogix.com). "Next" allows the Instructor to proceed to the next screen.

As illustrated in Fig. 4-3, the Instructor may read the submissions made by Employees of a heavy manufacturing company in September of 1998. By selecting "Back", the Instructor returns to the previous screen to review other possible Mission Assignments. If the Instructor likes this Mission Assignment, he selects "Save" and the email template seen on Fig. 4-3 appears. Note the email is sent to "M-104/8-12/2000". This identifies the list of students inscribed by this Instructor earlier. The URL is the same "M-104/8-12/2000" to which the Instructor types the identifying suffix, "midterm". If that suffix (the entire URL) name has been previously used, CompLogix.com software will make this URL unique by adding an additional suffix (01, 02, 03, etc.). Note the payment options for the Student. S/he may purchase a CD in the Campus Bookstore or use a credit card on the CompLogix.com website. With either option, the Student purchases a term or semester's access to the website for the cost of a medium-priced textbook. The Instructor completes and dispatches the email by selecting "Send".

"View Goals Assignments" lists Employees' goals actually submitted to CompLogix Consultants in their fieldwork. Here they are categorized by industry and date on inclusion in the CompLogix.com website. The purpose here is to train the Student in identifying goals that do not comply with CompLogix Goal-Setting criteria and to evolve a constructive dialogue designed to make the revised goals the goals of the Employee, not the goals of the Manager.

In Fig. 4-4, the Instructor may select "Back" to review the Goal-Setting Assignment list for other offerings, or select "Save" to select this as an assignment, generating the email seen in Fig. 4-3. Note that when a Student is performing this assignment, "Save" allows him to quit now and return to finish work later. "Send" saves the work as final and sends it to the Instructor's CompLogix.com mailbox.

In Fig. 4-5, progress Review Assignments are organized by industry and date of inclusion in CompLogix.com. The purpose of this assignment is to train the Student in dealing with negative information in a professional and constructive way. Progress Review results of "b" ("below expectation") are often opportunities for growth and progress, especially in the early part of the year. The Instructor selects "Insurance Personal Sales 101 02/99" and "Next" to proceed to the next screen.

In Fig. 4-6, the Instructor may select "Back" to review the Progress Review Assignment list for other offerings, or select "Save" to select this as an assignment, generating the email seen in Fig. 4-7. Note that when a Student is performing this assignment, "Save" allows him to quit now and return to finish work later. "Send" saves the work as final and sends it to the Instructor's CompLogix.com mailbox.

M&M Assignments are organized by job title and date entered on the CompLogix.com website. The purpose of these exercises is to develop in the Student a constructive and positive attitude and approach to conflict and problem resolution.

In Fig. 4-17, Instructor may select "Back" to review the M&M Assignment list for other offerings, or select "Save" to

select this as an assignment, generating the email seen in Fig. 4-3. Note that when a Student is performing this assignment, "Save" allows him to quit now and return to finish work later. "Send" saves the work as final and sends it to the Instructor's CompLogix.com mailbox.

Fig. 4-28 is page 1 of 2 that comprises the Mission exercise site. Page 1 identifies the Employee and gives the instructions and criteria for writing a Mission. Clicking the arrow allows the Employee to proceed to Mission Statement.

The Employee writes his version of this organizations Mission.

"Save" allows him to return to finish the work at a later date. "Send" sends a copy of his Mission (with submission date) to his CompLogix.com Personnel file and another copy to his Manager's CompileSite for this exercise.

In Fig. 4-9, another email instructs the Employee to participate in a Goal-Setting exercise. He may close the email window and open it at a later date to work on this exercise. He clicks the URL to go to the proper site.

Fig. 4-10 illustrates Goal-Setting, page 1 of 2. Here we see the employee identified. Seeing his name is an important psychological example of personalizing. We also see the final, compiled Mission of which he was a participant. This is essential to reading all the instructions and criteria of Goal-Setting. The mental sequence says, "Now that we know why we are here, Why are you here?"

In Fig. 4-10, on Goal-Setting, page 2 of 2, the Employee actually writes his own goals. It is important to remember that CompLogix goals do not repeat the purpose and objectives of this position as described in the Position

Description. Those objectives are covered by CompLogix in Goal 1, a default goal, to do the job you were hired to do to the best of your ability. The goals written in the CompLogix module will be goals designed to achieve Goal 1 faster, more effectively, efficiently, permanently, in short, CompLogix deals with the qualitative side of behavior. Goal 2 is also a default goal (although in the example here, the Employee deletes it, even though he is a Manager with three people reporting to him. CompLogix allows this deletion as a strike-through so that it will be highlighted and discussed with this Employee's Manager. The Employee goes on to write additional goals which will become the basis for an interesting revelation to his Manager and a constructive dialogue between employee and Manager.

Another email from this Employee's Manager was required of the CompLogix.com programming: a Progress Review result of "e" (exceeded) or "b" (below) expectations requires an explanatory email to the Employee. Here the Employee is invited to visit his Progress Review site. From there, he may decide to send a dissenting or explanatory email to his Manager.

In Fig. 4-11, we see the six options available to an Employee. All deal with communications, an important part of the CompLogix experience. Employee may select Review my Received Emails by date.

Emails are listed in chronological order, listing also sender and subject. The employee may click on an email to open and read it. "Back" returns the Employee to the Employee Options page and "Exit" exits him from the program. The Employee is invited to participate in a new

employee attitude survey (CompLogix M&M). By clicking on the indicated URL, the Employee is taken to the proper CompLogix website.

As illustrated in Fig. 4-12, the Employee completes the M&M exercise anonymously. Even CompLogix management cannot tell who completed which M&M exercise. CompLogix does know which Employee has used "Send" but we do not know what was sent. "Save" allows the Employee to quit and return to finish the work at a later time and "Send" saves the final work and sends it to the Manager's CompLogix.com mailbox.

Fig. 5 – Cost, Guarantee Web Page

As illustrated in Fig. 5-1, user selects "Cost, Guarantee" from the HomePage" and goes to page 1 of 3 of the text of the guarantee.

Fig. 6 – Become a Registered User Web Page

In Fig. 6-1, user may select "Back" and return to the first registration page 2 of 3. User does not fill in all blanks or selects "Contact me" or "Exit" and returns to the HomePage. If User fills in all the blanks and selects "Proceed", s/he can complete registration.

Fig. 7 – Self-Install Web Page

In Fig. 7-1, investor information will be posted on this site when and if it is available.

Fig. 8 – Employment Information Web Page

In Fig. 8-1, employment information may be posted.

Fig. 9 – Prospective User Web Page

CompLogix™ is a system of rationalized pay that is only possible when an organization is using the method of missions, goals and progress review results that constitute

the bulk of the psychology and philosophy of CompLogix.com. User requests information about CompLogix™ or a Registered CompLogix.com User enters here to use the program.

In Fig. 9-1, the Prospective User reads about CompLogix™ and then has the choice of going to the "Become a Registered User" site or returning to the HomePage.

In Fig. 9-2, we see the nine options of the CompLogix™ User. This User selects "Inscribe Employees in CompLogix™.

Upon indicating that all data has been accurately entered, User selects "Save" and is alerted with a dialogue box that Payroll Governance needs notification (for verification, at this point). CompLogix.com knows from the initial client registration who Payroll Governance is and what their email address is. Payroll Governance will receive an email with a URL directing them to this page in CompLogix.com. Programmer note: CompLogix™ changes are determined and authorized at the Manager level, and notifying e-mails come from the manager to the employee, but the changes are performed and/or governed by "Payroll Governance." Therefore Alerting Payroll Governance is a default "Yes."

"Award CompLogix™ \$ bonus" means that the dollar bonus amount will be adjusted up or down by the same per cent that the employee's CompLogix Progress Review results exceeded a perfect "m" score. This is done automatically as CompLogix.com scans each Employee page of the client's CompLogix website to make these calculations.

"Award CompLogix™ % bonus" means that the per cent bonus amount will be adjusted up or down by the same per

cent that the employee's CompLogix Progress Review results exceeded a perfect "m" score. This is done automatically as CompLogix.com scans each Employee page of the client's CompLogix website to make these calculations.

"Award Pay Change" is a straight pay award, not adjusted for over- or under-performance in CompLogix Progress Reviews.

"Award Shares" are typically awarded to individuals, not to groups. Here, CompLogix is used to record and communicate the award.

The amount of the award is identified.

Fig. 10 – Check Your Management IQ (MIQ)

In Fig. 10-1, the HomePage allows the User to select "Check Your MIQ (Management IQ)". This site is supposed to be only partially entertaining. The User answers 10 questions True or False and receives 15 points for each correct answer. Whether the answer is correct or wrong, a "Spokesperson" appears to expand on the correct answer. We intend to have a commercial artist develop CompLogix's own, proprietary Spokesperson (or "SpokesThing") instead of the Microsoft clipart used here.

"Check Your MIQ (Management IQ)" is also designed to be informative. Some of the questions will deal with recent or unusual personnel and management-related statistics.

Finally, "Check Your MIQ (Management IQ)" will have some questions that will be answered incorrectly by a person who lives with or believes in 20th Century or 19th Century stereotypes.

“Check Your MIQ (Management IQ)” is not interactive. A User may not go back, only forward (by left-clicking the mouse) or using the “PageDown” button on the keyboard.

Fig. 11 - Email Us Web Page

The HomePage allows the User to select “Email Us”, a standard communications box appears already addressed to info@CompLogix.com.

The HomePage allows the User to select “Book Order *Human Ground*” and in Fig. 11-4, Highlights of *Human Ground* are touted.

Fig. 12 - Useful Links Web Page

As illustrated in Fig. 12-1, from the HomePage, the User selects “Useful Links” and the User may select between six management/personnel related links. These will change from time to time, but in any event will complement the CompLogix program in areas such as labor law and employee selection.

Fig. 13 - Pitch Web Page

In Fig. 13-1, pitch is the website used by CompLogix Consultants to “pitch” the CompLogix program to prospective clients. These screens are not interactive, so they are not individually described. Positioning the sales document on the internet is designed to make the presentation of consistently high quality, especially because we can upgrade it centrally periodically. In addition to quality control, we believe we gain some degree of security from theft and plagiarism in this way.

Fig. 14 - Install Web Page

As illustrated in Fig. 14-1, Install is the website used by CompLogix Consultants to “install” the CompLogix

program in a new client's organization, usually beginning with the CEO and his or her immediate Managers. In this way, after the initial group has used the program for six months, they are capable of installing it with their own groups of managers at the self-install price. These screens are not interactive, so they are not individually described. Positioning the Install document on the internet is designed to make the presentation of consistently high quality, especially because we can upgrade it centrally periodically. In addition to quality control, we believe we gain some degree of security from theft and plagiarism in this way.

Now that the invention has been described,

WHAT IS CLAIMED IS:

1. A business management method, comprising the steps of:

logging-on a user and determining if the user is a manager of the company and if so, allowing the manager to use the method as a manager or to use the method as an employee;

for each user who is a manager, inscribing the manager's employees and indicating whether each such employee is also a manager and then set-up/authorize an exercise including at least one of the group of a mission statement, goal-setting, survey on morale and the quality of management (M&M) or exit interview;

for each user who is an employee, creating a draft mission in accordance with mission-setting criteria; and

performing a mission statements progress review and compilation by the respective manager to produce a final mission representative of respective employees' efforts and contributions and notification of final mission to the respective employees, including at least one of the group of notifications to respective employees of reminders and due dates for draft missions,

preserving words or phrases of each draft mission that comply with mission-setting criteria and omitting words or phrases of each draft mission that are inconsistent with mission-setting criteria to compile the final mission, or

notification to respective employees of the final mission.

2. The business management method as set forth in Claim 1, further including the steps of:

for each user who is an employee, creating draft goals in accordance with the final mission; and

performing goal-setting progress review and compilation by the respective manager to produce final goals representative of respective employee's efforts and contributions and notification of final goals to the respective employee, each including at least one of the group of

notifications to respective employee of reminders and due dates for draft goals,

preserving words or phrases of each draft goal that are compatible with the final mission and omitting words or phrases of each draft goal that are not compatible with the final mission or are not quantifiable to compile the final goals, or

notifications to respective employees of the final goals.

3. The business management method as set forth in Claim 2, further including the step of performing a progress review of each employee's goals by the respective manager including at least one of the group of

for each of the employee's goals, indicating whether the employee met expectations, was below expectations or exceeded expectations,

producing an explanatory e-mail to the employee for each goal that was below expectations and that exceed expectations and review any response thereto from the employee,

indicating completion of the employees' goal that met expectations, and

preserving the progress review for historical review and progress of not meeting, meeting and exceeding goals.

4. The business management method as set forth in Claim 3, further including the step of performing M&M creation and review including at least one of the group of

for each employee, completing a M&M anonymously,
compilation of completed M&Ms,

review of compilation and each employee M&M by the employees' respective manager with display of suggestions to the respective manager for improving M&M,

preserving the compilation of M&Ms for historical review and progress of suggested improvements, and

allow awarding of bonuses to employees in proportion to the M&M.

5. The business management method as set forth in Claim 4, further including the step of performing the exit interview.

6. The business management method as set forth in Claim 5, further including the step of allowing the users to create preferences including at least one of the group of:

alerts such as up-coming reviews, overdue reviews, mission's progress, goals progress, M&M progress, alert employees or alert level,

anniversary/progress review including date of progress review, review anticipation, anniversary greeting or anniversary pay change,

e-mails including e-mail copy lever or edit/compose standard e-mails,

whether to include his prior mission,
whether to allow use of current mission,
whether to include other prior missions, or
annual license renewal.

7. The business management method as set forth in Claim 4, further including the step of determining if the user is a consultant and if so, allowing the consultant to use the method as an employee, to pitch the method to a prospect, to install the method for a prospect or read mail or news.

8. The business management method as set forth in Claim 4, further including the step of determining if the user is an outside director or trustee and if so, allowing the outside director or trustee to complete a M&M on his chief executive officer.

9. The business management method as set forth in Claim 4, further including the step of determining if the user is an instructor and if so, allowing the consultant to use the method as a manager, use the method as an employee, conduct sensitivity and communications training, research, set and review assignments, use a management teaching module and inscribe students or use an advisor module and inscribe students.

10. The business management method as set forth in Claim 4, further including the step of determining if the user is a student and if so, allowing the student to complete an assignment.

11. The business management method as set forth in Claim 1, further including the step of providing information for prospective users of the method including managers using the method, manager sensitivity and positive communications

training, employees, business degree candidates, faculty teaching, faculty advising students and outside directors.

12. A business management method, comprising the steps of:

logging-on a user and determining if the user is a manager of the company and if so, allowing the manager to use the method as a manager or to use the method as an employee;

for each user who is a manager, inscribing the manager's employees and indicating whether each such employee is also a manager and then set-up/authorize an exercise including at least one of the group of a mission statement, goal-setting, survey on morale and the quality of management (M&M) or exit interview;

for each user who is an employee, creating draft goals in accordance with a pre-existing mission statement; and

performing goal-setting progress review and compilation by the respective manager to produce final goals representative of respective employee's efforts and contributions and notification of final goals to the respective employee, each including at least one of the group of

notifications to respective employee of reminders and due dates for draft goals,

preserving words or phrases of each draft goal that are compatible with the final mission and omitting words or phrases of each draft goal that are not compatible with the final mission or are not quantifiable to compile the final goals, or

notifications to respective employees of the final goals.

13. The business management method as set forth in Claim 12, further including the step of performing a progress review of each employee's goals by the respective manager including at least one of the group of

for each of the employee's goals, indicating whether the employee met expectations, was below expectations or exceeded expectations,

producing an explanatory e-mail to the employee for each goal that was below expectations and that exceed expectations and review any response thereto from the employee,

indicating completion of the employees' goal that met expectations, and

preserving the progress review for historical review and progress of not meeting, meeting and exceeding goals.

14. A business management method, comprising the steps of:

logging-on a user and determining if the user is a manager of the company and if so, allowing the manager to use the method as a manager or to use the method as an employee;

performing M&M creation and review including at least one of the group of

for each employee, completing a M&M anonymously,

compilation of completed M&Ms,

review of compilation and each employee M&M by the employees' respective manager with display of suggestions to the respective manager for improving M&M, or

preserving the compilation of M&Ms for historical review and progress of suggested improvements, or
allow awarding of bonuses to employees in proportion to the M&M.

15. A business management method, comprising the step of allowing managers to check their management IQ by presenting questions to each manager, grading answers provided by the manager and providing explanations for each incorrect answer provided by the manager.

16. A business management method, comprising the steps of:

providing information for prospective users of the method including at least one of the group of managers using the method, manager sensitivity and positive communications training, employees, business degree candidates, faculty teaching, faculty advising students and outside directors;

logging-on a user and at least one of the group of
determining if the user is a consultant and if so,
allowing the consultant to use at least one of the group of the method as an employee, to pitch the method to a prospect, to install the method for a prospect and read mail or company news,

determining if the user is an instructor and if so,
allowing the consultant to use at least one of the group of the method as a manager, use the method as an employee,
conduct sensitivity and communications training, research, set and review assignments, use a management teaching module and inscribe students or use an advisor module and inscribe students

determining if the user is a student and if so,
allowing the student to complete an assignment,

determining if the user is an outside director and
if so, allowing the outside director is to complete a survey on
morale and the quality of management (M&M) on his chief
executive officer, or

determining if the user is a manager of the
company and if so, allowing the manager to use at least one
of the group of the method as a manager, to use the method
as an employee, the conduct sensitivity and communication
training or to inscribe outside directors,

allowing the users to create preferences including at
least one of the group of:

alerts such as up-coming reviews, overdue reviews,
mission's progress, goals progress, M&M progress, alert
employees or alert level,

anniversary/progress review including at least one
of the group of date of progress review, review anticipation,
anniversary greeting or anniversary pay change,

e-mails including edit/compose standard e-mails,
whether to include his prior mission,
whether to allow use of current mission,
whether to include other prior missions, or
annual license renewal,

for each user who is a manager, inscribing his
employees and indicating whether each such employee is also
a manager and set-up/authorize an exercise including at
least one of the group of

mission statement with close dates and
notifications,

goal-setting,
M&M, or
exit interview,

for each user who is an employee, creating a draft mission in accordance with mission-setting criteria;

performing a mission statements progress review and compilation by the respective manager to produce a final mission representative of respective employees' efforts and contributions and notification of final mission to the respective employees, including at least one of the group of notifications to respective employees of reminders and due dates for draft missions,

preserving words or phrases of each draft mission that comply with mission-setting criteria and omitting words or phrases of each draft mission that are inconsistent with mission-setting criteria to compile the final mission, or notification to respective employees of the final mission;

for each user who is an employee, creating draft goals in accordance with the final mission;

performing goal-setting progress review and compilation by the respective manager to produce final goals representative of respective employee's efforts and contributions and notification of final goals to the respective employee, each including at least one of the group of

notifications to respective employee of reminders and due dates for draft goals,

preserving words or phrases of each draft goal that are compatible with the final mission and omitting words or phrases of each draft goal that are not compatible

with the final mission or are not quantifiable to compile the final goals, or

notification to respective employees of the final goals;

performing a progress review of each employee's goals by respective manager including at least one of the group of

for each of the employee's goals, indicating whether the employee met expectations, was below expectations or exceeded expectations,

producing an explanatory e-mail to the employee for each goal that was below expectations and that exceed expectations and review any response thereto from the employee,

indicating completion of the employees' goal that met expectations, or

preserving the progress review for historical review and progress of not meeting, meeting and exceeding goals;

performing M&M creation and review including at least one of the group of

for each employee, completing a M&M anonymously,

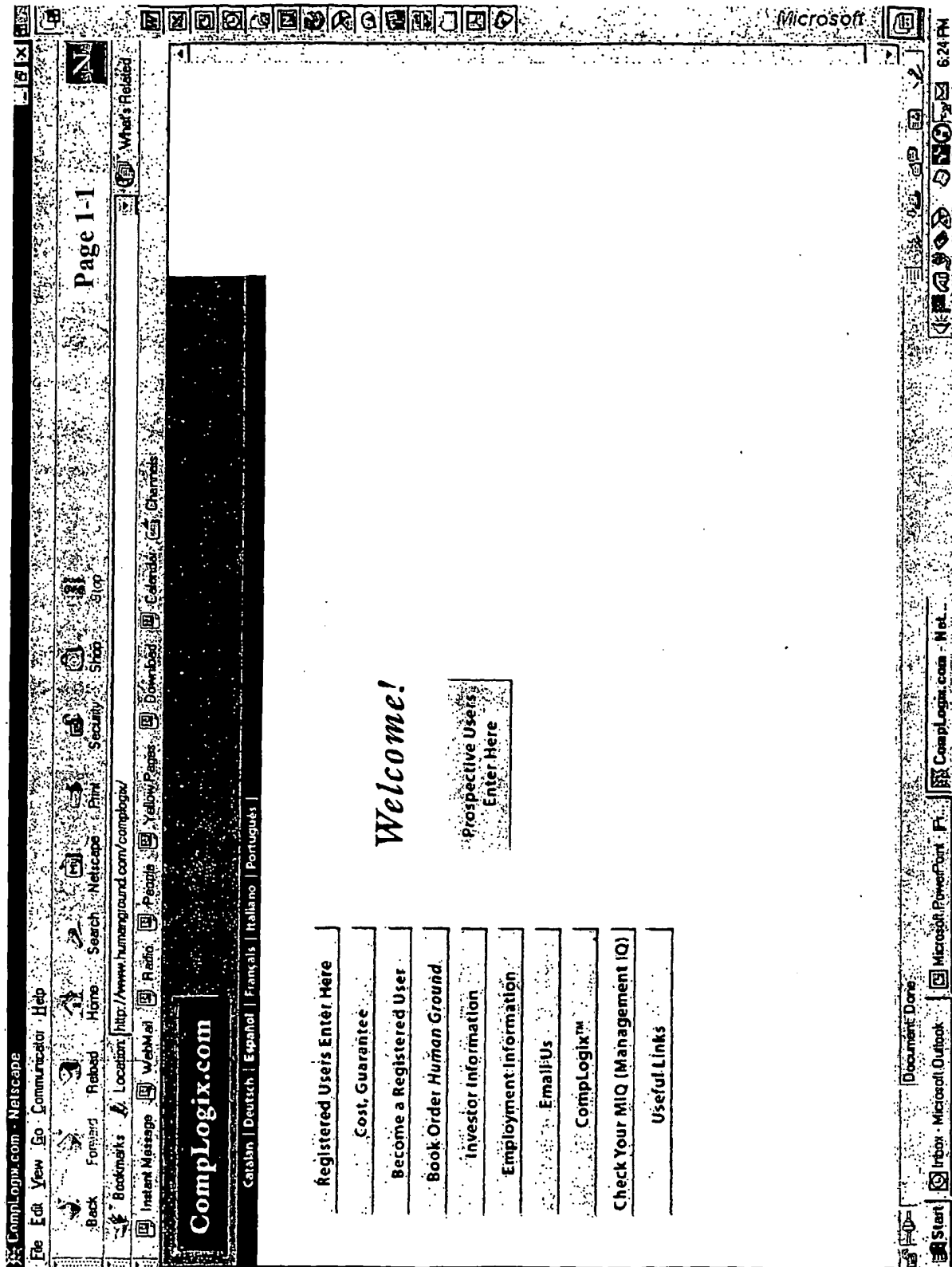
compilation of completed M&Ms,

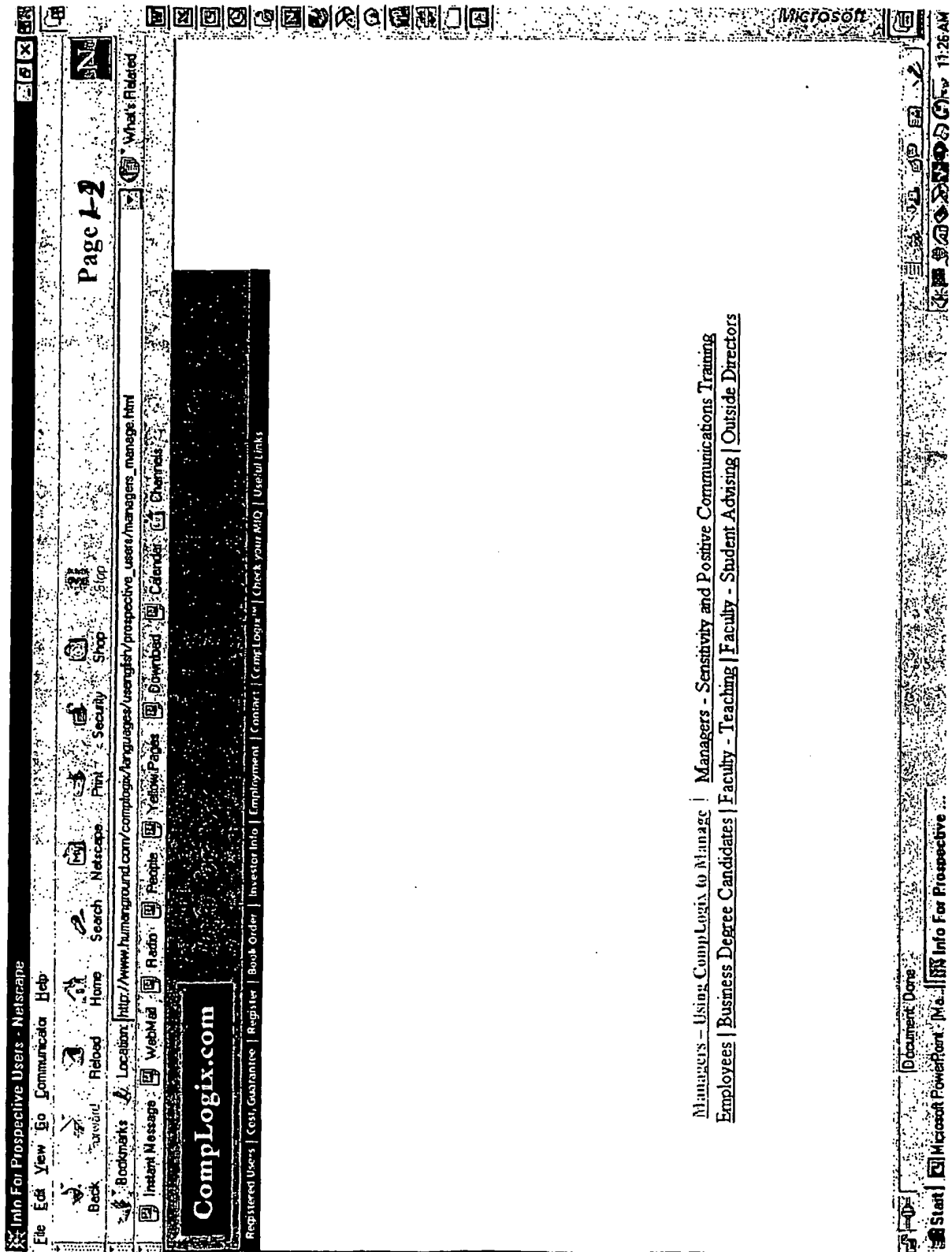
review of compilation and each employee M&M by the employees' respective manager with display of suggestions to the respective manager for improving M&M,

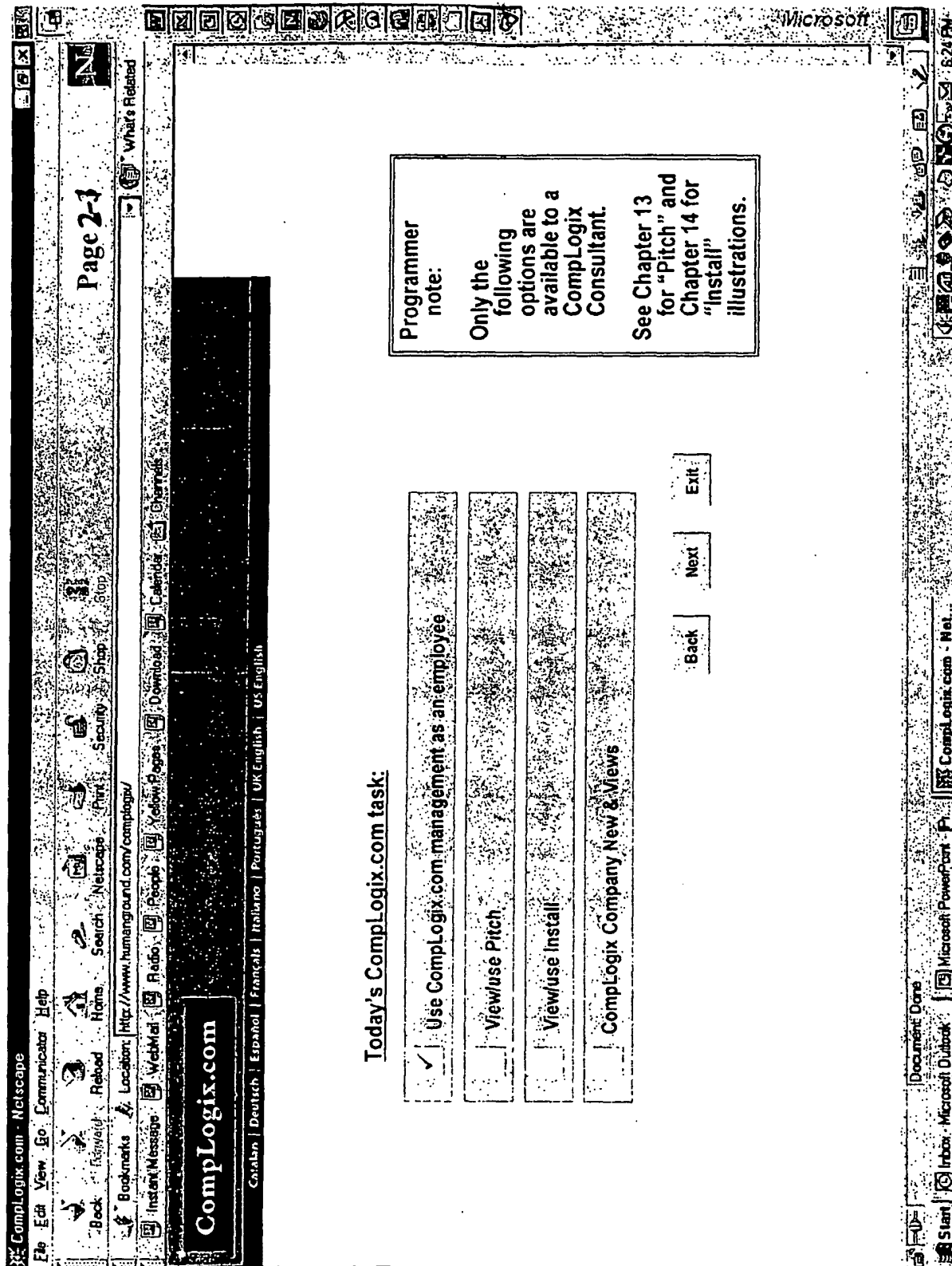
preserving the compilation of M&Ms for historical review and progress of suggested improvements, or

allow awarding of bonuses to employees in proportion to the M&M;

view e-mails to respective employees by managers;
deactivate employees from the method and allowing exit interviews;
allowing transfers and promotions of each employee to a new manager with e-mail notification to the employee; and
allowing managers to check their management IQ by presenting questions to each manager, grading answers provided by the manager and providing explanations for each incorrect answer provided by the manager.







CompLogix.com - Netscape

File Edit View Go Communicator Help

Back Forward Reload Home Search Netscape Print Security Shop Stop

Bookmarks Location: <http://www.humanground.com/complog/>

Instant Message WebMail Radio People Yellow Pages Download Calendar OranWeb

Page 2-2

What's Related

CompLogix.com

Ellen Smart
Vice President - Sales

04/03/93 5

Catalan | Deutsch | Espanol | Français | Italiano | Português | UK English | US English

Today's CompLogix.com task:

- ☒ Use CompLogix.com management as a manager
- ☐ Use CompLogix.com management as an employee
- ☐ Use CompLogix.com sensitivity/communications training
- ☐ Viewfuse Pitch
- ☐ Viewfuse Install
- ☐ CompLogix Company New & Views

Back Next Exit

Programmer note:
Only the following options are available to a CompLogix Manager

Document Date

Start Inbox Microsoft Outlook Microsoft PowerPoint P: CompLogix.com - Net

Microsoft 6:24 PM

CompLogix.com - Netscape

File Edit View Go Communicator Help

Back Forward Reload Home Search Netscape Print Security Shop Sjon

Bookmarks Location http://www.humanground.com/complogix/

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Page 2-3

What's Related

CompLogix.com

Catalan | Deutsch | Espanol | Français | Italiano | Português | UK English | US English

Today's CompLogix.com task:

- ☒ Use CompLogix.com management as a manager
- ☐ Use CompLogix.com management as an employee
- ☐ Use CompLogix.com sensitivity/communications training
- ☐ Research/Set/Review Assignments
- ☐ Use the management teaching module/inscribe students
- ☐ Use the advisor module/inscribe students

Programmer note:
Only the following options are available to an Instructor

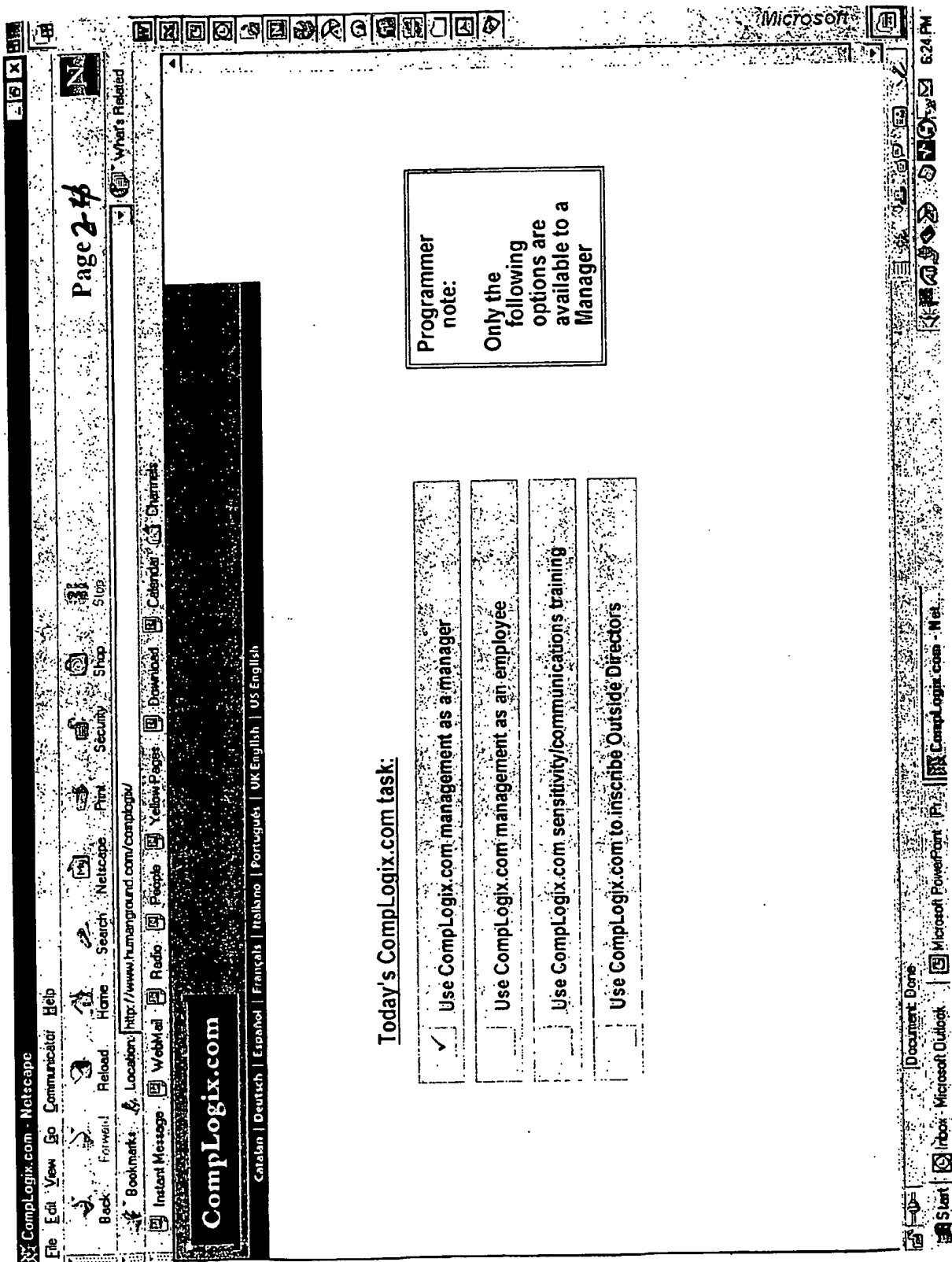
Back Next Exit

Document Done

Start Inbox Microsoft Outlook Microsoft PowerPoint - P... CompLogix.com Net...

Microsoft

6:24 PM



CompLogix.com - Netscape
File Edit View Go Communicator Help
Back Forward Reload Home Search Netscape Print Security Shop Stop
Bookmarks Location: http://www.humanground.com/complogix/
Instant Message WebMail Radio People Yellow Pages Download Calendar Channels
Page 2 of 2

CompLogix Home Page for Ellen Smart
Vice President - Sales
04/03/93

Catalan Deutsch Español Français Italiano Portugues UK English US English

employees
StartDate
title
name

1. Preferences
2. Inscribe new employee
3. Set-Up/Authorize an Exercise
4. Compile Missions (1-800-656-7117)
5. Edit Goals (1-800-656-7117)
6. Edit Progress Review
7. View/Print M&M Reports
8. View e-mails
9. De-activate employee
10. Transfers and Promotions

Back Next Exit

Document Done
Start Inbox Microsoft Outlook Microsoft PowerPoint IP CompLogix.com - Net

Microsoft

CompLogix.com - Netscape
File Edit View Go Communicator Help

Back Forward Reload Home Search Netscape Print Security Shop Stop

Bookmarks Location: <http://www.humanground.com/complogix/>

Instant Message WebMail Radio People Yellow Pages Downloads Calendar Channels

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What's Related

CompLogix.com

Ellen Smart
Vice President - Sales

04/03/93 5:15

Catalan Deutsch Español Français Italiano Português UK English US English

2 Inscribe new employee

3 Set-Up/Authorize an Exercise

4 Compile Missions (1-800-656-7117)

5 Edit Goals (1-800-656-7117)

6 Edit Progress Review

7 View/Print Progress Review

8 View Employee Progress

9 De-activate Employee

10 Transcribe Employee

1-2 Anniversary/Progress Review

1-3 E-mails

1-4 Include my prior Mission

1-5 Allow use of my Mission(s)

1-6 Include others' prior Mission(s)

1-7 Annual CLX license renewal

1-1-2 Overdue reviews

1-1-3 Missions' progress

1-1-4 Goals' progress

1-1-5 M&Ms' progress

1-1-6 Alert employees

1-1-7 Alert level

Programmer note:
"X" appears in the default (recommended) position

Back Next Exit

Document Done

Start Inbox Microsoft Outlook Microsoft PowerPoint IP Microsoft Word Net...

6:24 PM

CompLogix.com - Netscape
File Edit View Go Communicator Help

Back Forward Reload Home Search Netscape Print Security Shop Stop

Bookmarks Location: <http://www.humanground.com/complogix/>
Instant Message WebMail Radio People Yellow Pages Download Calendar Channels

Page 2-7

What's Related

CompLogix.com

Catalan | Deutsch | Español | Français | Italiano | Português | UK English | US English

CompLogix HomePage for Ellen Smart Vice President - Sales

04/03/93 5

1-1 Alerts

1-2-1 Date of Progress Review

1-2-2 Review anticipation

1-2-3 Anniversary greeting

1-3 E-mails

1-4 Include my prior Mission

1-5 Allow use of my Mission(s)

1-6 Include others' prior Miss

1-7 Annual CLX license renew

1-8 Disenable CompLogix

2 Inscribe new employee

3 Set-Up/Authorize an Exercise

4 Compile Missions (1-800-656-7117)

5 Edit Goals (1-800-656-7117)

6 Edit Progress Review

7 View/Print M&M Reports

8 View e-mails

9 De-activate employee

10 Transfers and Promotions

Programmer note:
"X" appears in the default (recommended) position

Back Next Exit

Document Done

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6:24 PM

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Vice President - Sales
04/03/93 5

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2 Inscribe new employee

3 Set-Up/Authorize

4 Compile Mission

5 Edit Goals (1-800)

6 Edit Progress Review

7 View/Print M&M

8 View e-mails

9 De-activate employee

10 Transfers and Promotions

1-1 Alerts

Dear <Salu>>:
Your anniversary with this organization is on <StartDate>>. From all of us, we wish you a Happy Anniversary and hope our association continues to be rewarding.
Sincerely,
<<Manager>>
You may:
☐ edit this email
☐ customize yearly
☐ use five random CompLogix texts

1-3-1 E-mail copy level

Company Anniversary ☒
Birthday ☐
Holiday Greeting ☐
Welcome Back ☐
Get Well Soon ☐

Back Next Exit

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1-1 Alerts

1-2 Anniversary/Progress Review

1-3 E-mails

1-4 Mission Log

1-5 Allow use of my Mission(s)

1-6 Include others' prior Mission(s)

1-7 Annual CLX license renewal

1-8 Disenable CompLogix

2 Inscribe new employee

3 Set-Up/Authorize an Exercise

4 Compile Missions (1-800-656-7117)

5 Edit Goals (1-800-656-7117)

6 Edit Progress Review

7 View/Print M&M Reports

8 View e-mails

9 De-activate employee

10 Transfers and Promotions

Yes ☒

No ☐

Programmer note:

If "yes," whenever a new Mission exercise is undertaken, include the last Mission (if there is one) as one of the submissions at the CompileSite.

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Set Up / Utilize CLX Exercise

Click on Mission Statement for list of prior/completed Missions.

Participants

Mission Statement		Goal-Setting		M&M		Exit Interview	
mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy

standard e-mail?
Yes ☐ No ☐

Participants

Mission Statement		Goal-Setting		M&M		Exit Interview	
mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy

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CompLogix.com
Lucinda Murray
President and CEO
10/03/88 12

Outside Directors/Trustees

Announce exercise to all ("write") ☐ Send report to all ("read") ☐

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ABC Company (Chicago) Mission
Closed Date 05/15/2000

To add value to our customers process with quality products of high standards. To be the cutting edge of market intelligence for our company enabling it to evolve ahead of trends.

Provide profitable growth of our products, through strategic management of a distribution network focused on niche markets.

We are in the unique position of being the inventor of a product in great demand in the pharmaceutical, bio-tech, corrosive chemicals and abrasive minerals industry. Without it, an alternate source would be greater expense to the end-user. Therefore, products such as fertilizer, tioz, kaolin, chlorine, bromine, drugs and pharmaceuticals would be cost prohibitive.

To provide superior products and service in the areas we serve. To furnish our customers the best possible solutions to their needs at a fair price.

Provide superior products at a fair price. Ensure customer satisfaction with dependable, knowledgeable service. Provide solutions and new products to enhance customer requirements.

To achieve company targets and operate profitably by providing reliable product, accurately and on time. To be the industry leader in the development of new products to meet the future needs of the market place. To provide high quality product and after sales service.

While you are on this webpage, you may phone 1-800-656-7117 for simultaneous assistance.

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↑ ↓

Page 1

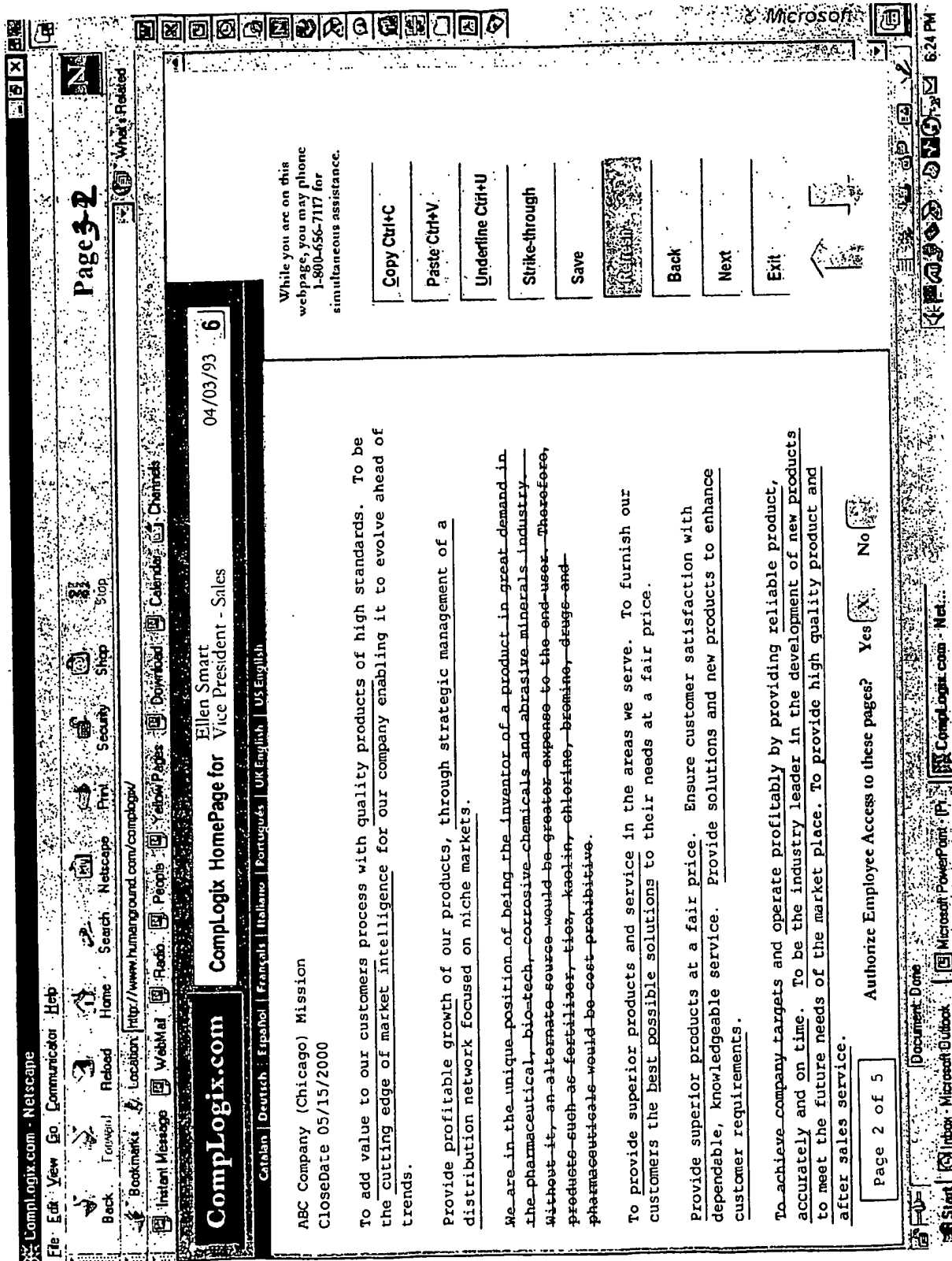
Authorize Employee Access to these pages? Yes ☒ No ☐

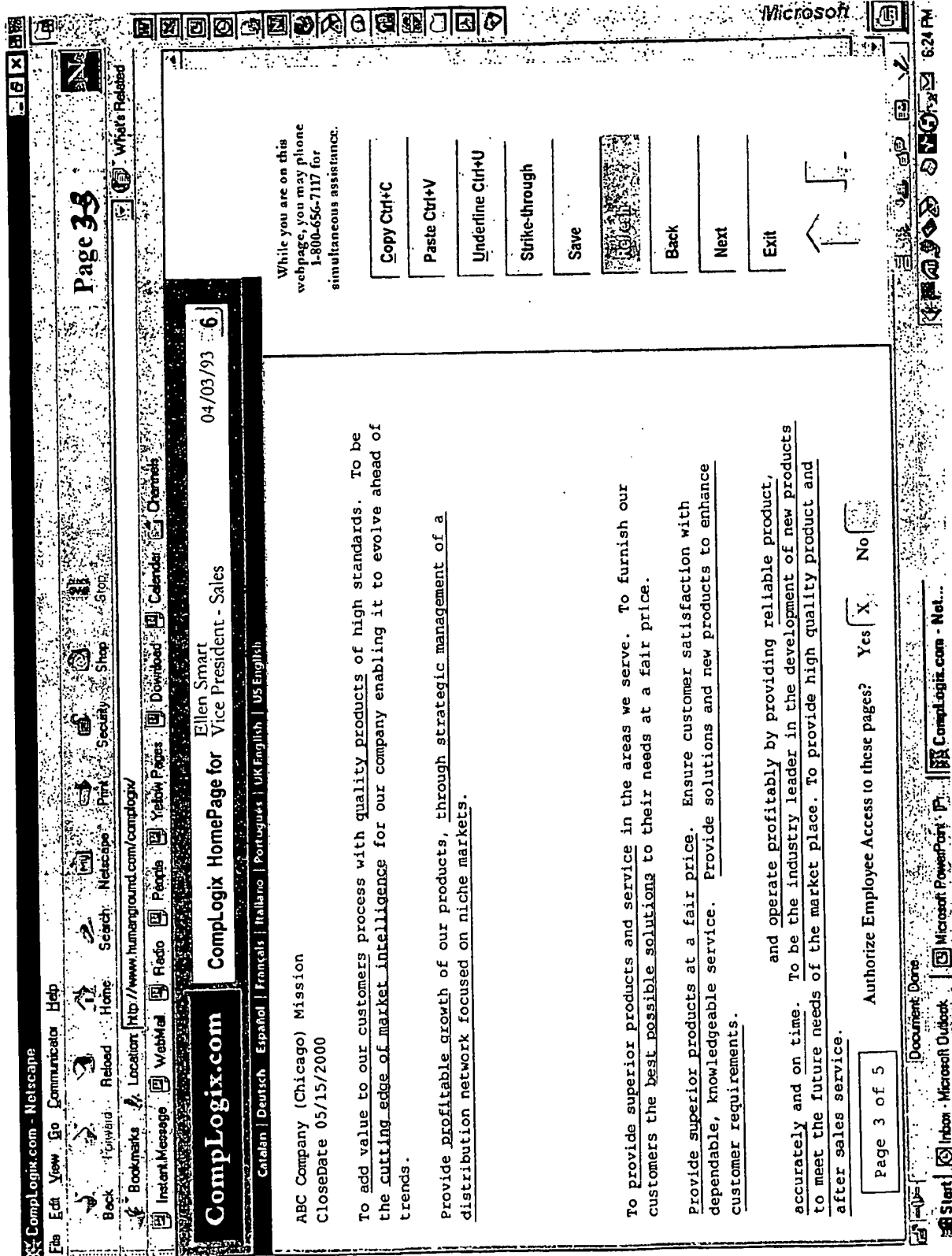
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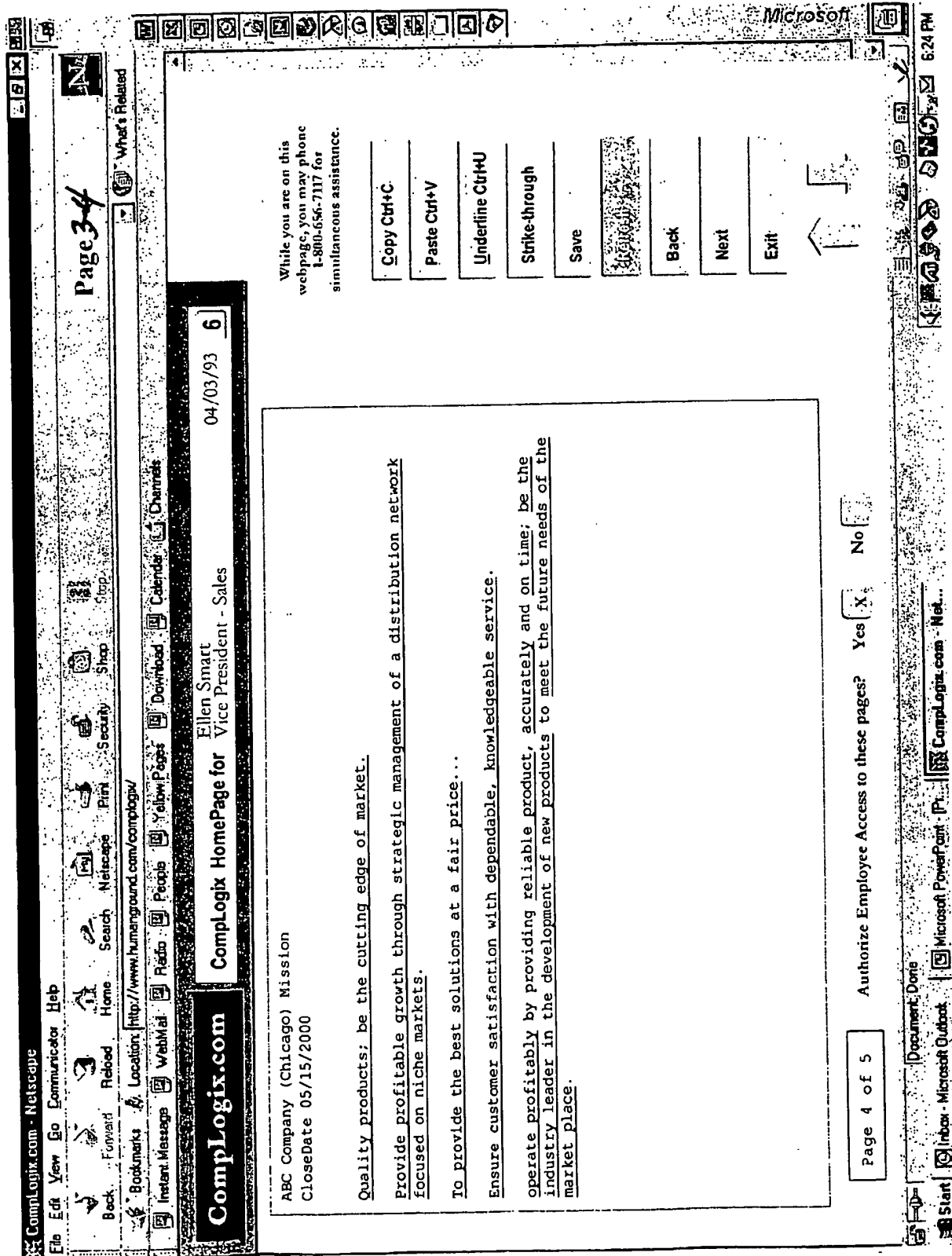
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CompLogix.com

Ellen Smart
Vice President - Sales
04/03/93 6

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The Mission of the ABC Company is achieve sales and profit growth by providing value to our customers in niche markets with products that are state-of-the-art and solution-oriented, and service that is timely and accurate, through a well developed and well managed distribution network.

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CompLogix.com Administrator
To: e_smart@JDW.com/cix
Subject: Completed Mission
Click here for 3 Set-Up/Authorize an Exercise to communicate this missions and implement goal-setting
Click here to be reminded of the need for goal-setting
Click here to exit this function
Thank you.
CompLogix.com Administrator

Page 5 of 5
Authorize Employee Access to these pages? Yes No

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Vice President - Sales

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5 Edit Goals (1-800-656-7117)

While you are on this webpage, you may phone 1-800-656-7117 for simultaneous assistance.

Goals - Bob MacNamara (10-12-98) CloseDate October 30, 1999

- 1 Perform the expectations of the basic job description as well as possible.
- 2 (If you supervise or manage anyone) to assure that at least 80% of your team members achieve at least 80% of their goals.
3. Increase direct sales to end users 30% a year.
4. Maintain present distribution organization.
5. Increase number of sales people reporting to me.

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Strike-through

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Goal Setting Criteria

- Mission compatible
- Growth-oriented
- Worthy, noble
- Realistic
- Quantifiable

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Progress Review Robert MacNamara, 1999, Goals 5 of 5 10/12/1998

Ellen Smart

To: r_macnamara@JDW.com /CLX
Cc: l_murray @JDW.com /CLX
Subject: Progress Review, 07/14/99, Goal 4

Regarding the rating of "M" for goal 4, your attendance and participation have been excellent and, as importantly, they have had an important affect on your people. They are charged!

Accordingly, we will call this goal "accomplished" and replace it with a new challenge resulting from the recent M&M exercise. Please get back to me before the end of the week so we can reach closure on this item.

Good work, Bob. Keep it up.

Ellen Smart

1. Perform by basic job	Completed
2. Assure that at least 80% of their goals.	Completed
3. Add one (1) new sales by Sept 30.	Completed
4. Achieve 100% attend meetings: zero complaints.	Completed
5. Help Roger and Martha 1,200 and Robert 1,300, y	Completed

Back Save Print Exit

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M&M Report by CloseDate

Page 1 of 1

Manager
Ellen Smart

Group
Cleveland Sales

Participants
3

CloseDate
07/11/1999

Q	1	2	3	4	5	6	7	Weighted average of all
1	2	2	3					2.05
2	2	3	2					2.05
3	3	3	2					2.05
4	4	3	4					3.23
5	1	2	1					1.17
6	3	4	3					2.93
7	3	3	3					2.64
8	2	3	2					2.05
9	3	3	3					2.64
11	4	4	3					1.17
12	4	3	4					3.67
13	5	4	5					3.67
14	3	2	3					4.67
15	3	2	3					2.67
16	4	5	4					2.67
17	3	4	3					4.33
18	3	2	3					3.33
19	4	4	4					2.67
20	2	2	2					4.00
21	3	2	3					2.00
22	3	3	3					2.67
23	2	1	3					3.00
24	2	1	2					2.00
								1.67

Morale 22
Management 43
Total 65

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Manager
Ellen Smart

Group
Cleveland Sales

Participants
3

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07/11/1999

10. Accessibility

Meaning. A good M&M score means "Someone cares, and I have access to that someone." A poor score means "I am on my own, and maybe no one cares."

Info-gathering. Talk to your manager and your most reliable 2 or 3 people. Seek their opinion of the "Meaning" given above. Seek ideas that will allow a physical solution (not an emotional one) that is practicable (doesn't create another problem, such as wasting time).

Implementation. Communicate your new accessibility policy via email and one-on-one. During one-on-one communications, ensure people feel part of a partnership and that you have a genuine interest in their success.

	Q	1	2	3	4	5	6	7	Weighted average of all
20	2	2	2	2					2.00
21	3	2	3						2.67
22	3	3	3						3.00
23	2	1	3						2.00
24	2	1	2						1.67

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M&M Report by CloseDate

Programmer note:
There will be suggestions for improving all 24 scores separately. This page only illustrates one way of handling this piece.

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	CloseDate	07/11/99	08/08/98	01/12/98	08/01/97
Manager					
Ellen Smart					
Group					
Cleveland Sales					
# of Review Dates					
6					
Morale					
% Δ since last	25	24	22	21	
% Δ last 12 mos.	0.0	+9.1	0.0	+4.8	
% Δ lifetime	+4.2	+9.1	+4.8	+4.8	
Management					
% Δ since last	43	40	36	37	
% Δ last 12 mos.	+4.9	+11.1	-2.7	0.0	
% Δ lifetime	+7.5	+8.1	-2.7	0.0	
Total					
% Δ since last	68	62	58	59	
% Δ last 12 mos.	+1.5	+6.9	-1.7	+1.7	
% Δ lifetime	+9.7	+6.9	0.0	+1.7	
	+17.2	+6.9	0.0	+1.7	

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1. Preferences

2. Inscribe new employee

3. Set-Up/Authorize an Exercise

4. Compile Missions (1-800-656-7117)

5. Edit Goals (1-800-656-7117)

6. Edit Progress Review

7. View/Print M&M Reports

9. De-activate employee

10. Transfers and Promotions

Select a name to see all emails:

Name	Start Date	End Date	e-mail
George Scott	04/15/97	03/31/99	g_scott@JDW.com
Annette Robust	03/04/97	05/15/97	a_robust@JDW.com
Robert MacNamara	10/12/98		r_macnamara@JDW.com
Susan Quincey	04/15/99	07/30/99	s_quincey@JDW.com
Mary Ann Sisk	06/03/98		m_sisk@JDW.com
John Smith	07/03/97	08/15/99	j_smith@JDW.com
Roger Washington	04/04/98		r_washington@JDW.com
Caren Williamson	09/03/96		c_williamson@JDW.com
James Zilinski	09/03/96		j_zilinski@JDW.com
Suzanne Zylace	02/02/99		s_zylace@JDW.com

By Employee: ☐ By Date: ☒

View e-mails by employee: Active ☐ All ☒

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PN

Click on the

Robert MacNamara	10/12/98	r_macnamara@JDW.com
MaryAnn Siski	06/03/98	m_siski@JDW.com
Roger Washington	04/04/98	r_washington@JDW.com
Caren Williamson	09/03/96	c_williamson@JDW.com

Ellen Smart

To: j_glushik@JDW.com /CLX

Cc: l_murray@JDW.com /CLX

Subject: De-activation

Effective Date of Deactivation: 04/15/2000

Explanation:

Resigned to accept position as Assistant Marketing Director of Associated Industries in Atlanta.

Exit Interview? ☒ Yes ☐ No

CompLogix Private Employee

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CompLogix.com

1. Preferences

2. Inscribe new employee

3. Set-Up/Authorize an Exercise

4. Compile Missions (1-800-656-7117)

5. Edit Goals (1-800-656-7117)

6. Edit Progress Review

7. View/Print M&M Reports

8. View e-mails

9. De-activate employee

Transfer/Cancel Promotions

Promotion memo

Fr: e_smart@JDW.com /CLX
Cc: l_murray@JDW.com /CLX
Subject: Promotion of E Adamms

Effective Date of Promotion: 07/01/2000

Newly reporting to: Adams Ames

Employees assigned:

Name	StartDate
1. Jennifer Gromaski	02/28/1998
2. John McMahon	04/15/1994
3. Edith Evelyn	04/21/1993
4. Macarthur MacArthur	10/11/1997

Tab for more Employee assignment slots.

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Vice President - Sales

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10 Administrators and Permissions

Enter Name and StartDate of employee to be transferred

Adamms, E	02/01/95
Becklean, W	01/02/98
Bethune, G	04/05/87
Cardyle, S	01/04/98
Castelli, S	07/02/93
Donavan, MR	01/02/98

Enter Name of new manager

Adamms, E

Employee assigned to manager named above

Confirming e-mail

OK

OK

E-mail to Payroll Governance

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Lucinda Murray

To: e_adams@JDW.com/CLX
CC: InterestedParties@JDW.CX; j.rogers@JDW.com/CLX
Subject: Promotion to Manager

Per our conversation, you are promoted to Region Sales Manager. Congratulations!
I have inscribed you as a Manager in CLX.

1. Your promotion is effective April 1, 2000.
2. You will report to Alex Russell, Vice President of Sales, Northeast Region.
3. You have a new Manager password to use when working with your Employee's CLX accounts
ex021J

When operating within the CLX site as an Employee (not as a Manager), you will use your Employee Password.
4. Changes in compensation will be confirmed by our Payroll Governance Officer:
John Rogers, e-mail j.rogers@JDW.com/CLX

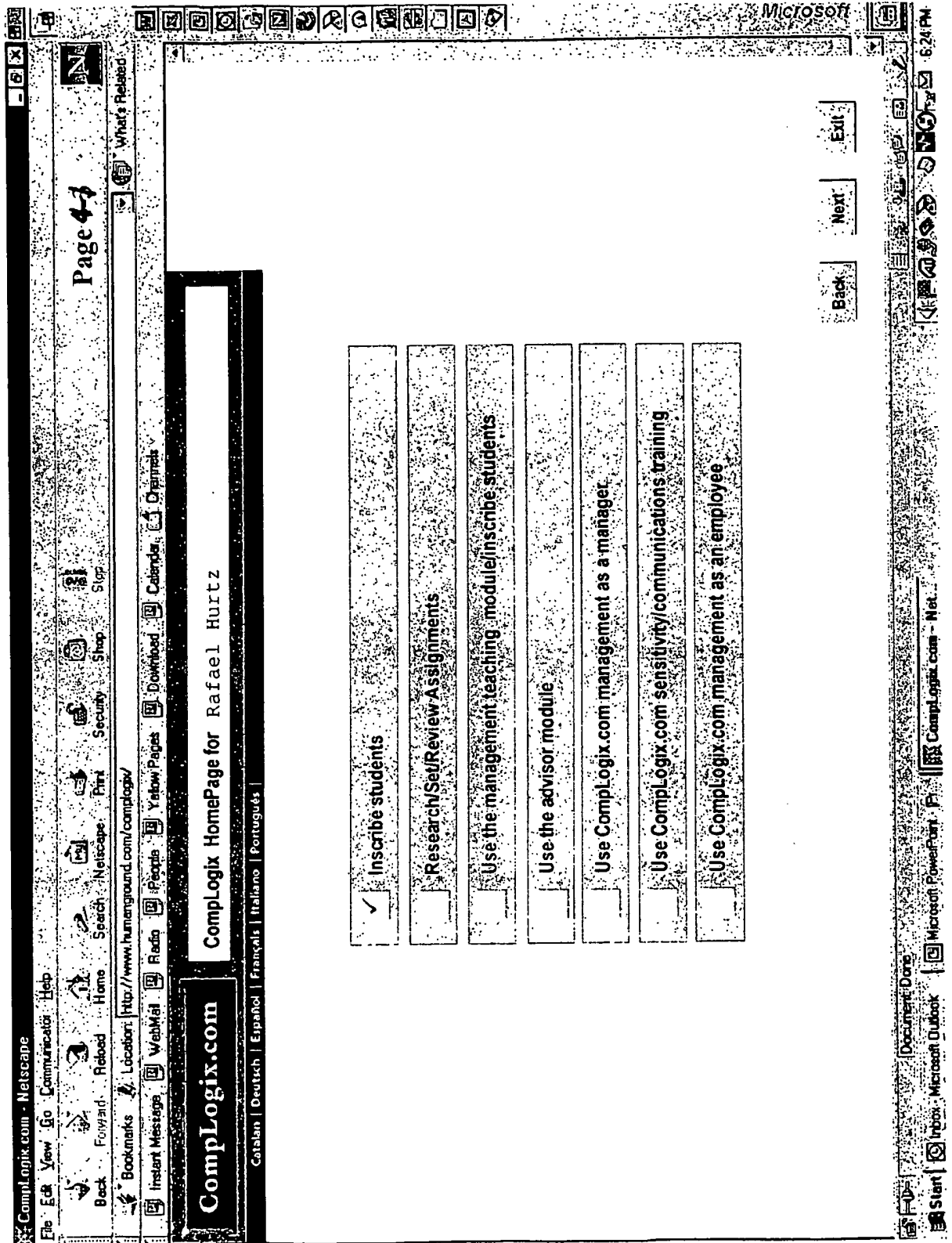
5. You may name Employees to your group and another Manager may assign employees to your group. Should any transfers be made in error, please notify your Manager immediately.
6. Your first responsibility will be to set up your CLX Preferences. Click this URL for immediate access (or visit the site soon to complete these important formalities):
www.http://CompLogix.com/register.html

Good luck, Ed, and congratulations, again. Let me know if I can help.

Lucinda Murray

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Instructions for inscribing Students. Complete one inscription site for each class or course.

Name this class or course by catalogue number:

For the period/semester (enter in year)

Enter Last name, first initial, second initial or "N" for a missing initial; no spaces, no dots/periods.

CompLogix will assign each Student a password.

Student Participants

Canavan, ME	mw4009	Nolan, ME	mw4017
Kusiak, SI	mw4010	O'Brien, JB	mw4018
Russell, JB	mw4011	Dugan, SD	mw4019
Russell, NW	mw4012	Ryan, CF	mw4020
Lyman, TF	mw4013	Genzowski, JE	mw4021
Preston, HR	mw4014	Mohammad, AL	mw4022
Rosenwald, JT	mw4015	Diaz, AV	mw4023
Pesche, HE	mw4016	LaFountain, DA	mw4024

Print list? ☐ Y ☐ N

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Microsoft

8:24 PM

CompLogix.com

Assignment - Missions - Heavy Manufacturing 102 (09/98)

Instructions: Strike thru (S/T), Underline, Delete, Copy, paste (V) and Refresh to evolve a "bottoms up" Mission that complies with the five Mission Criteria.

ABC Company (Chicago) Mission
CloseDate 05/15/2000

To add value to our customers process with quality standards. To be the cutting edge of market company enabling it to evolve ahead of trends.

Provide profitable growth of our products, through a distribution network focused on niche markets.

We are in the unique position of being the inventor of great demand in the pharmaceutical, bio-tech, abrasive minerals industry. Without it, an greater expense to the end-user. Therefore, productioz, kaolin, chlorine, bromine, drugs and ph prohibitive.

To provide superior products and service in the furnish our customers the best possible solution fair price.

Provide superior products at a fair price. Equip with dependable, knowledgeable service. Provide solutions and new products to enhance customer requirements.

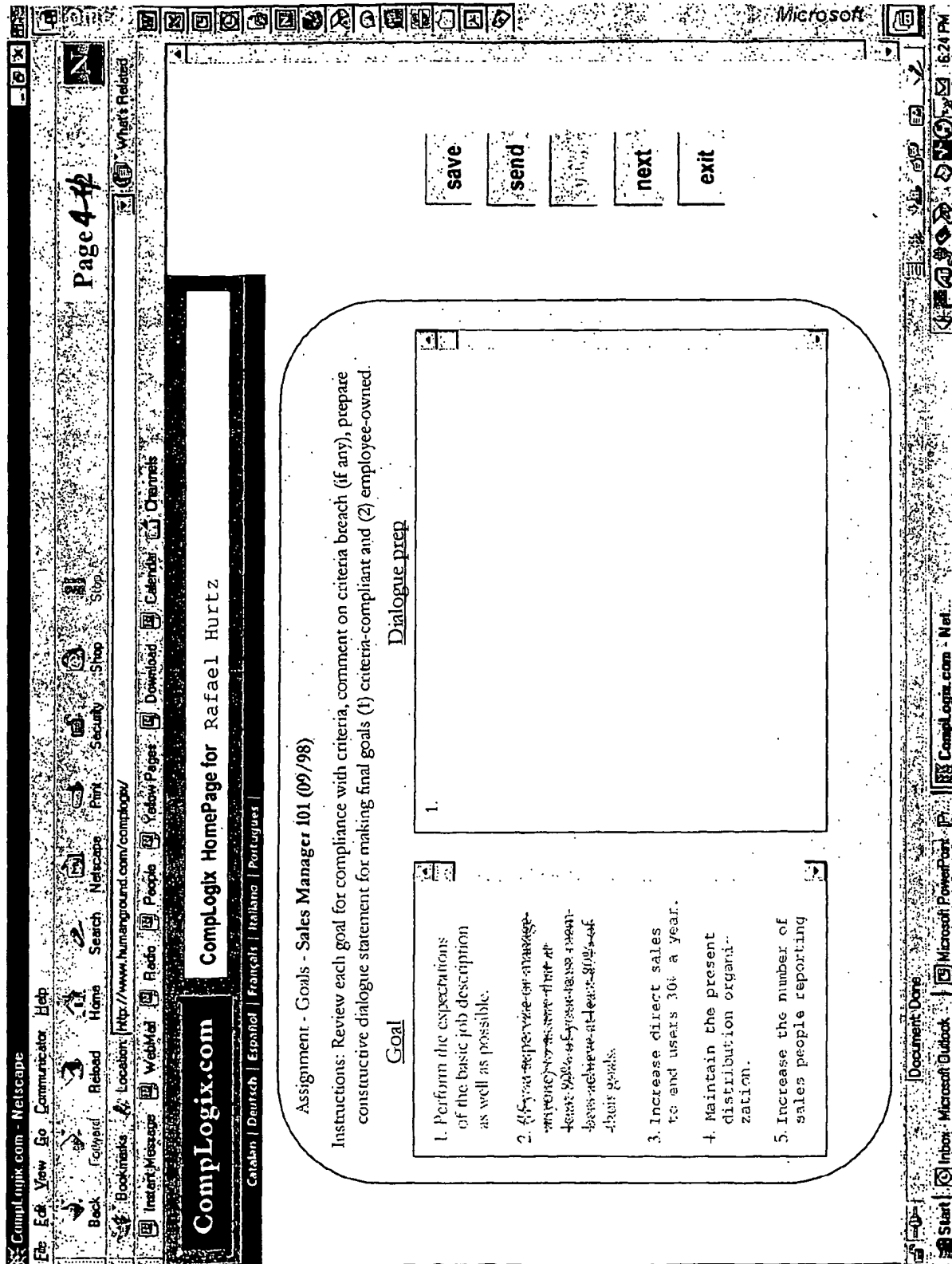
Dr Rafael Hurtz
To: M-104/B-12/2000
RE: Mission Statement
Date: 11/10/99

Please note and complete the Mission Assignment identified here:
www.clx.com/M-104/midterm

Please note the CloseDate:
11/24/ 1999

Thank you.
URL Access CDs are available in the Campus Bookstore or, using a credit card and the clx.com ID previously assigned to you, on www.clx.com/studentcredit

S U D C V R send back next exit



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Progress Review Assignment

Banker 101	10/98
Banker 102	04/99
Insurance Commercial Sales 102	05/99
Brokerage Private 101	04/98
Brokerage Institutional 102	02/00

Progress Review Assignment

Real Estate Sales Residential 101	03/00
Real Estate Sales Commercial	102 04/00
Driver Route Sales	02/99
Warehouse Supervisor 102	10/99
Manufacturing 101	12/99
Sales Manager 101	09/98

select back exit

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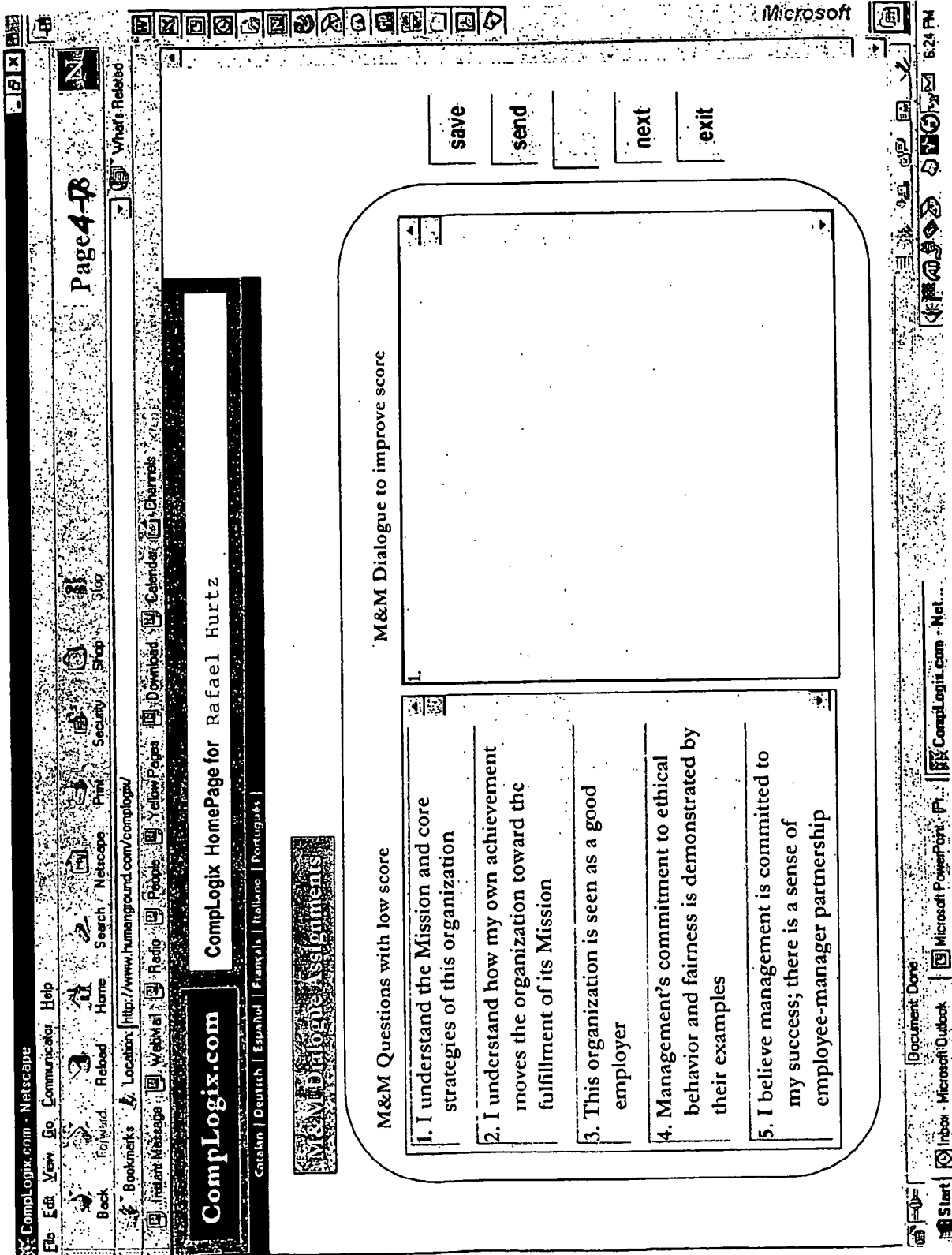
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Assignment - Progress Review - Insurance Personal Sales 101 02/99
Instructions: Check each review result for compliance with criteria, comment on criteria breach (if any), prepare constructive dialogue statement dealing with "b" (below expectation) results..

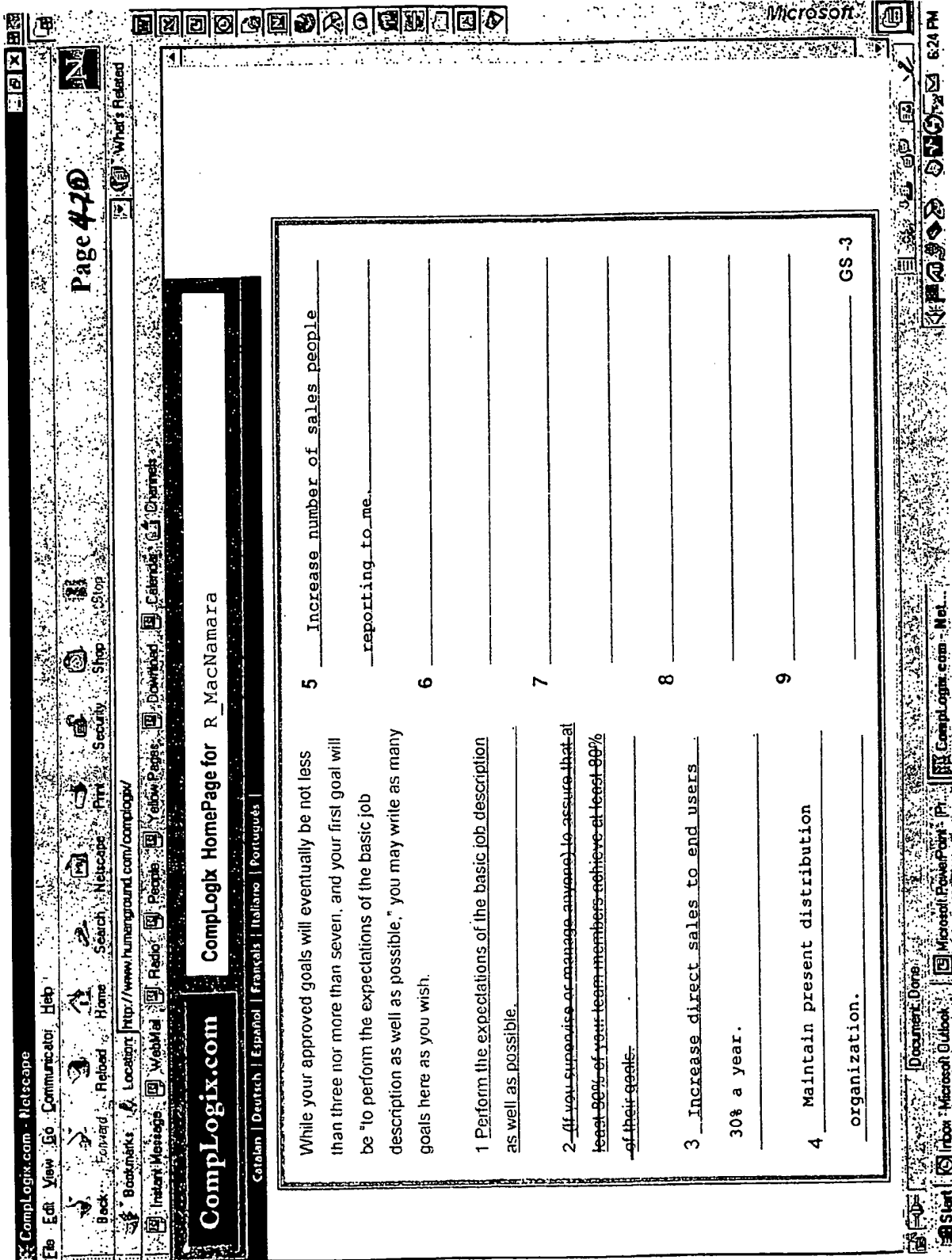
Goal	Result/Rating	Dialogue prep
1. Perform the expectations of the basic job description as well as possible.	1. Sales goal was for 150 in the first quarter; 75 was booked but Manager was assured that another 45 were in the pipeline. Rating: "M".	1.
2. (If you supervise or manage anyone) to assure that at least 80% of your team members achieve at least 80% of their goals.	2. Rating: "M".	send
3. Increase the number of sales people reporting to me by adding one (1) new salesperson by Mar 30 and qualifying him/her by September 30.	3. Rating: "M".	next
4. Set an example of 100% attendance and participation at sales meetings. Zero complaints.	4. Manager is assured there are plans to improve attendance. Rating: "B".	exit
5. Help Roger and Martha	5. Rating: "M".	

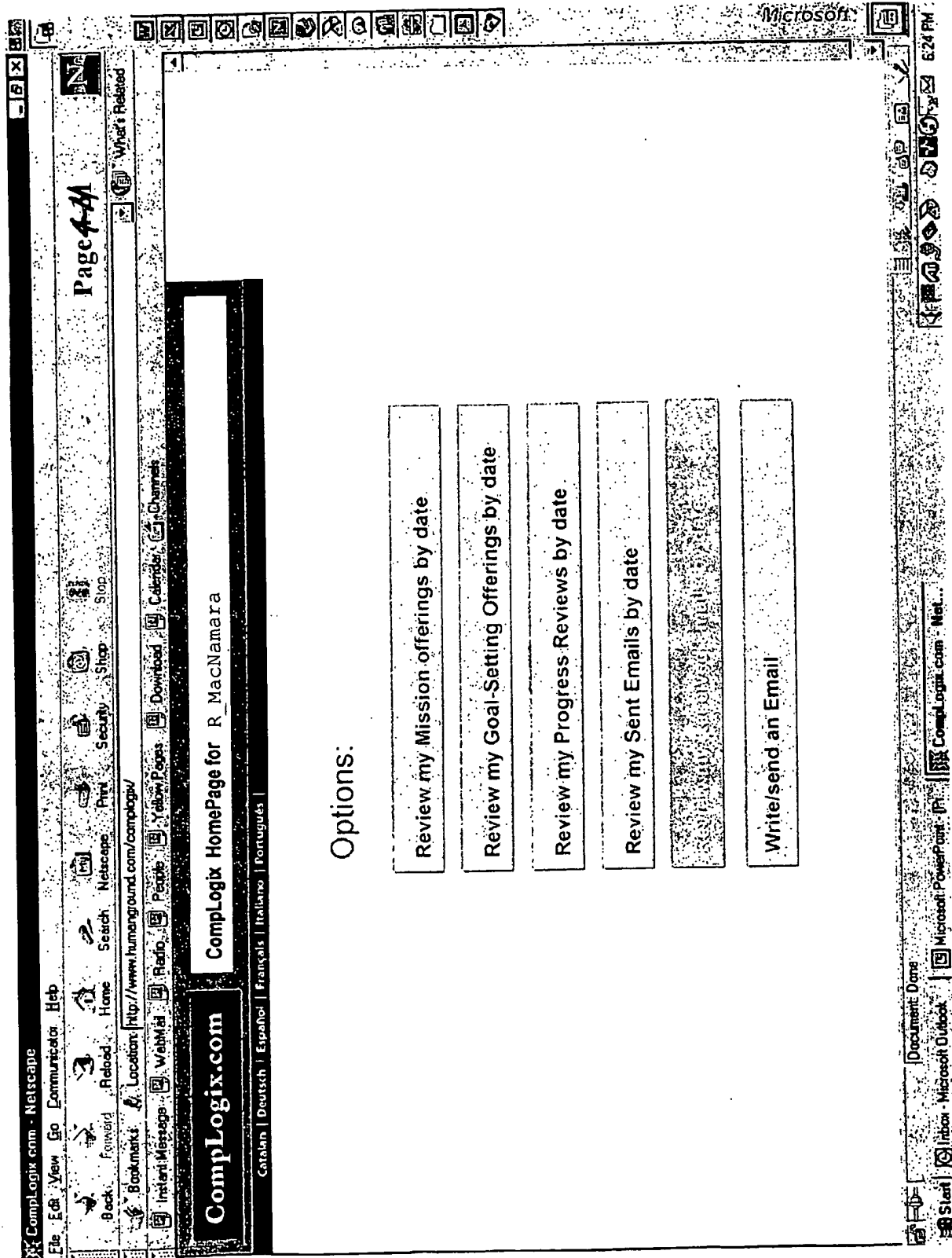
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GS-1





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Registered Users | Cost, Guarantee | Register | Book Order | Investor Info | Employment | Contact | ComplLogix™ | Check your MIO | Useful Links

A ComplLogix.com installation is \$5,000. This investment buys:

1. An hour of consulting before the workshop to set your ComplLogix goals for the six months following the workshop.
2. A workshop for you and up to nine of the people who report directly to you. This will last about 3 hours.
3. In the workshop, your employees will have co-authored a Mission Statement approved by you and they will have taken a first cut at their own professional goals for the next twelve months.
4. You will receive two more hours in consulting time to show you how to refine and cultivate employee goals as well as coaching on a couple of Progress Reviews.
5. You will receive a one-year license to the ComplLogix website allowing you to use the tools and reminders employed in running the system; your access to your data records is permanent, even if you cease to be a client.
6. During the first six months following the workshop, your employees will participate in a ComplLogix M&M exercise (*morale and quality of management assessment*) which will tell you the steps to take to become an even more effective manager and communicator.
7. You will receive a free copy of our acclaimed book *Human Ground*.
8. You will receive our money-back guarantee.

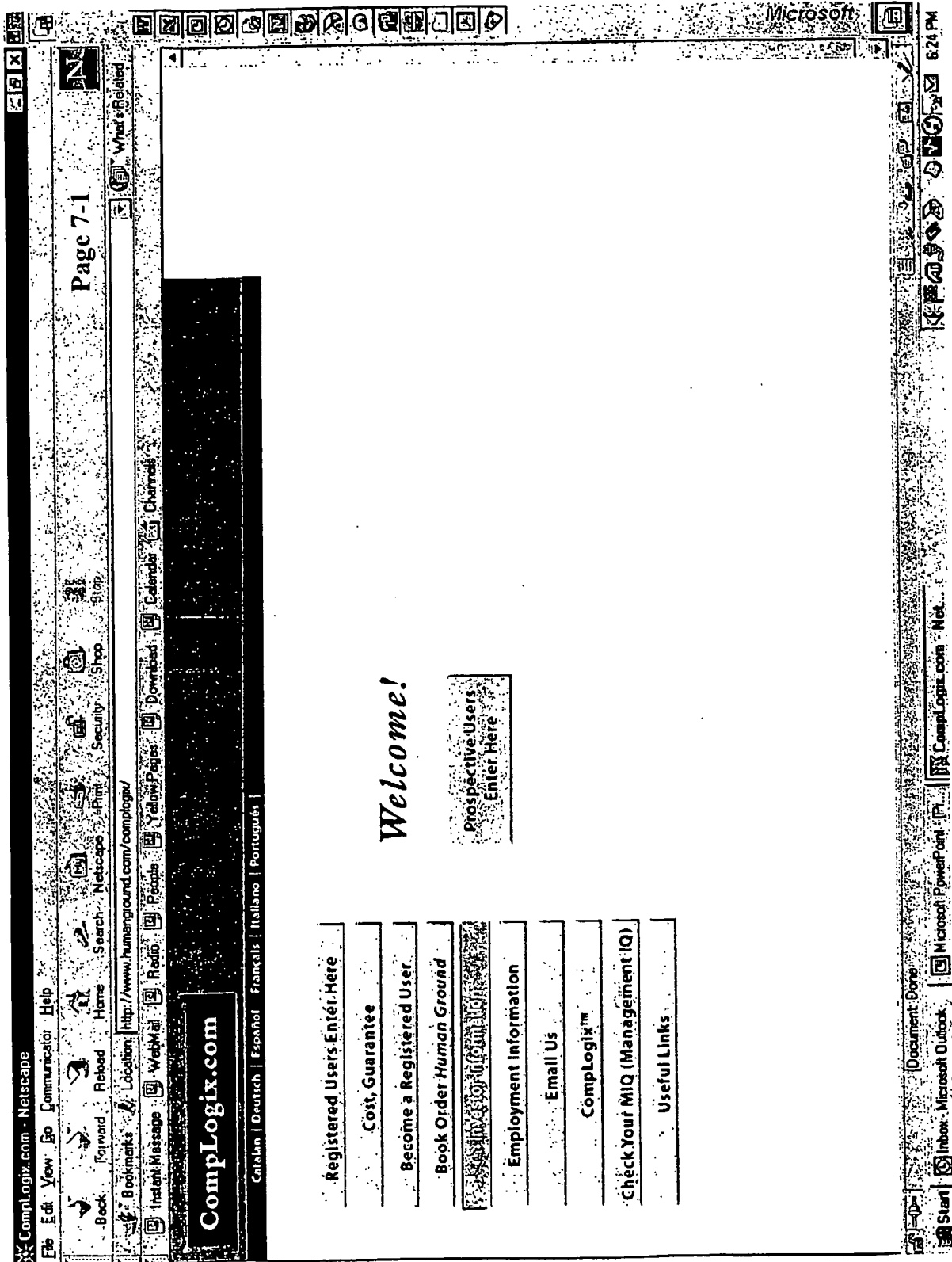
You may self-install ComplLogix.com for \$500. In addition, there is an annual website license fee for the greater of \$500 or \$2.75 per employee using the site in the prior twelve months.

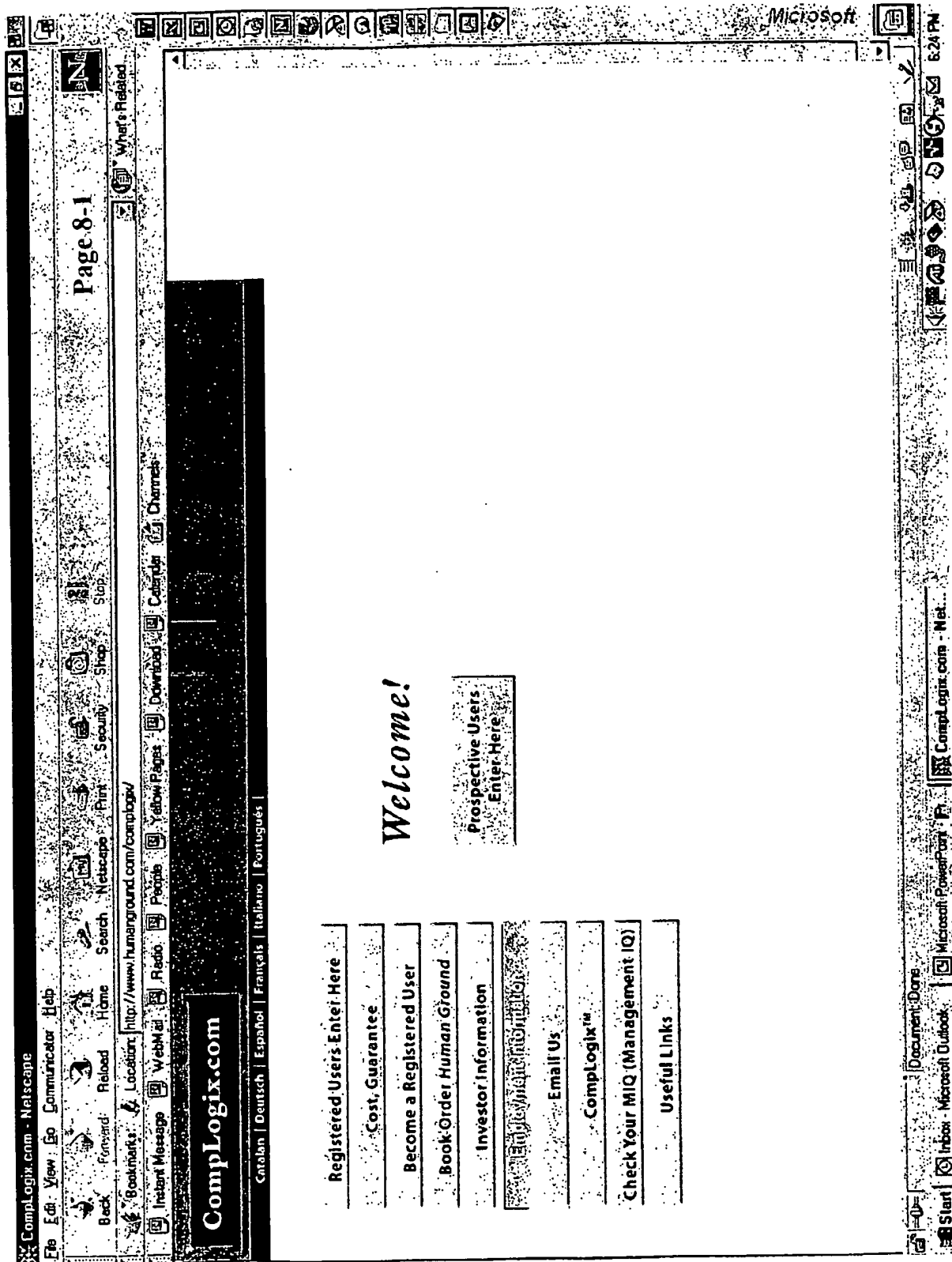
Page 1 of 3

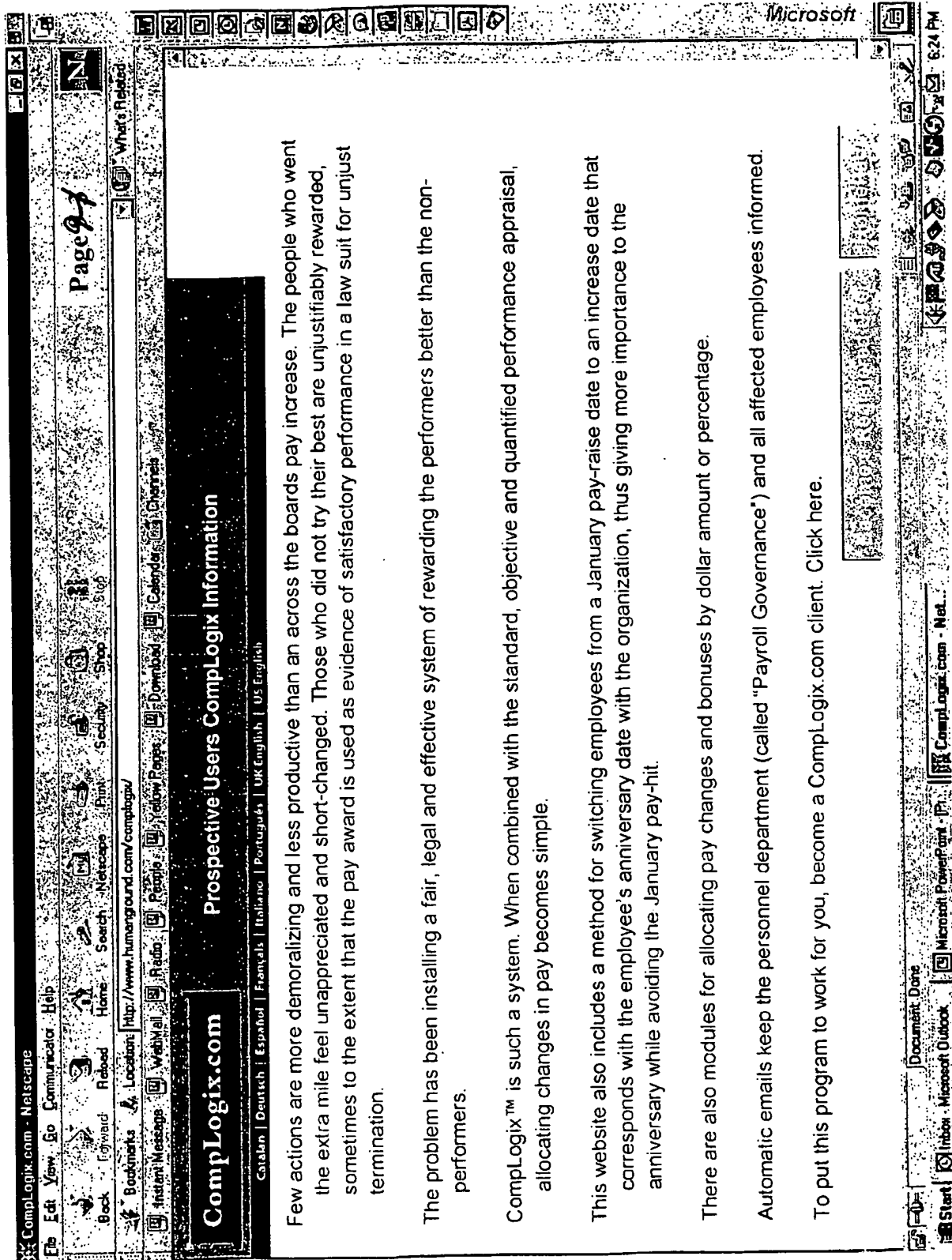
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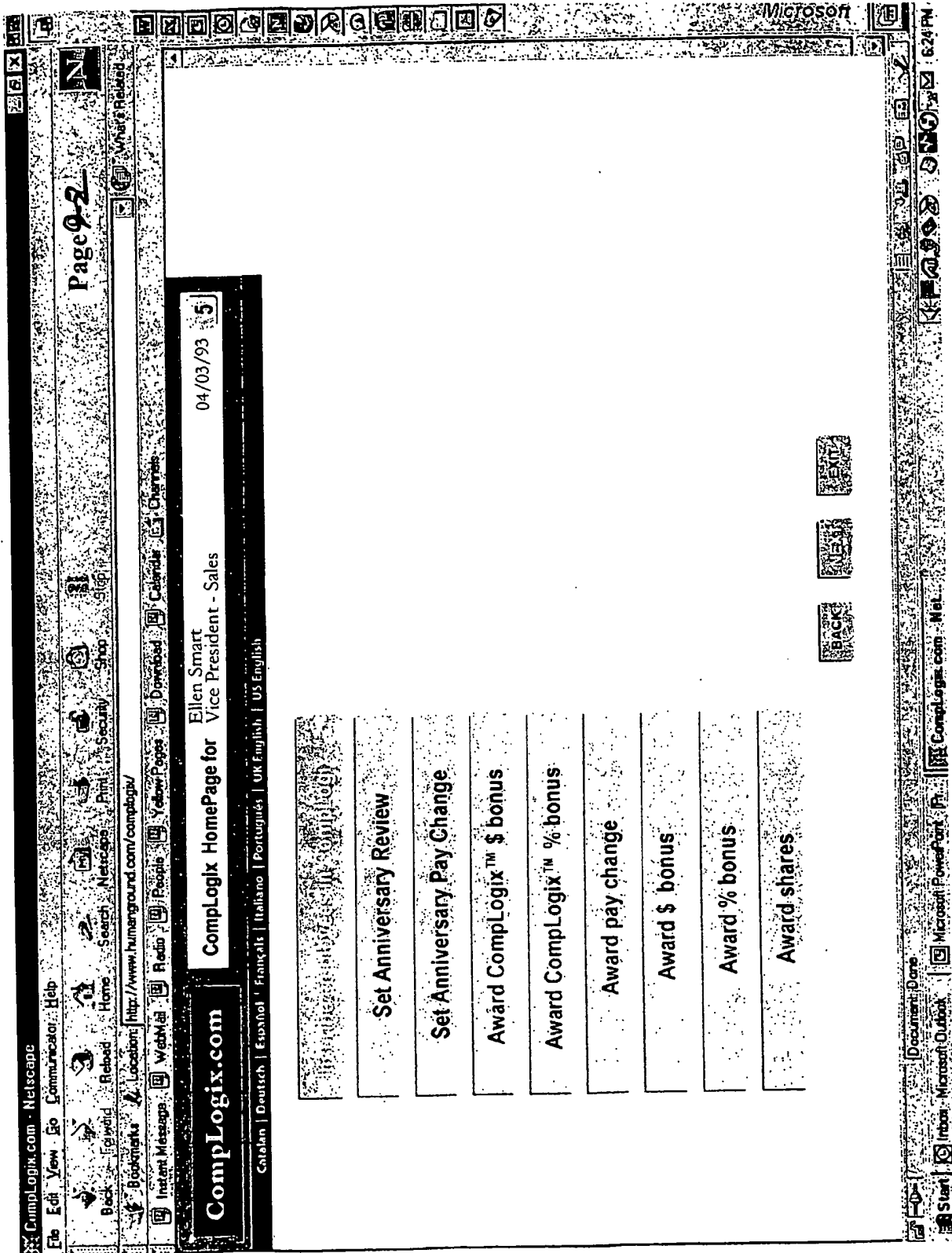
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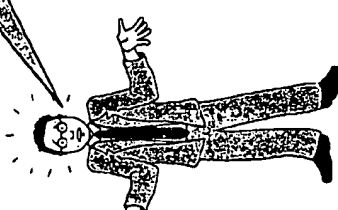
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Management IQ Quiz

CompLogix.com



Eam 15 points for each right answer.

Quiz #12, posted 01/03/2000. Click here for earlier quizzes

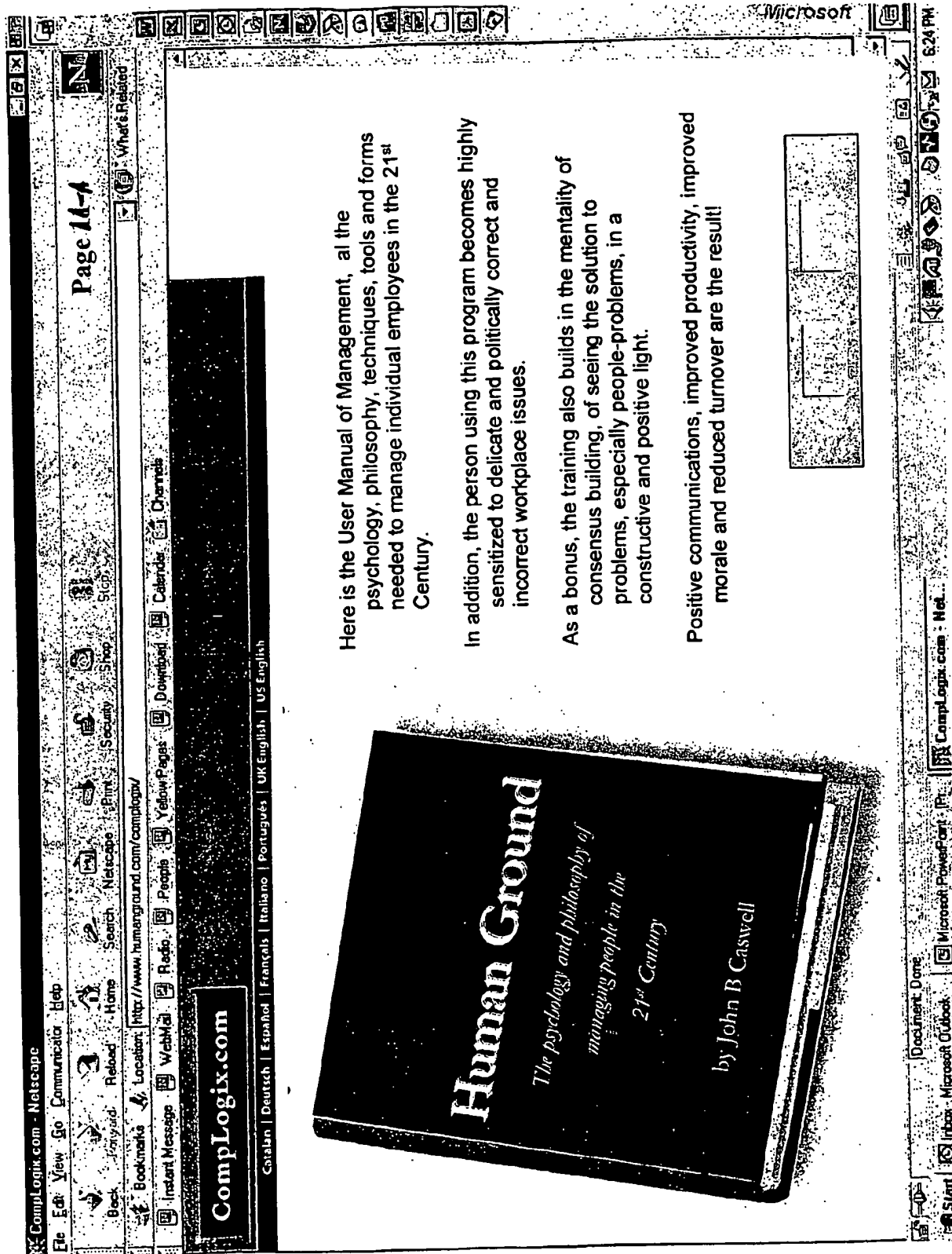
True	False
<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
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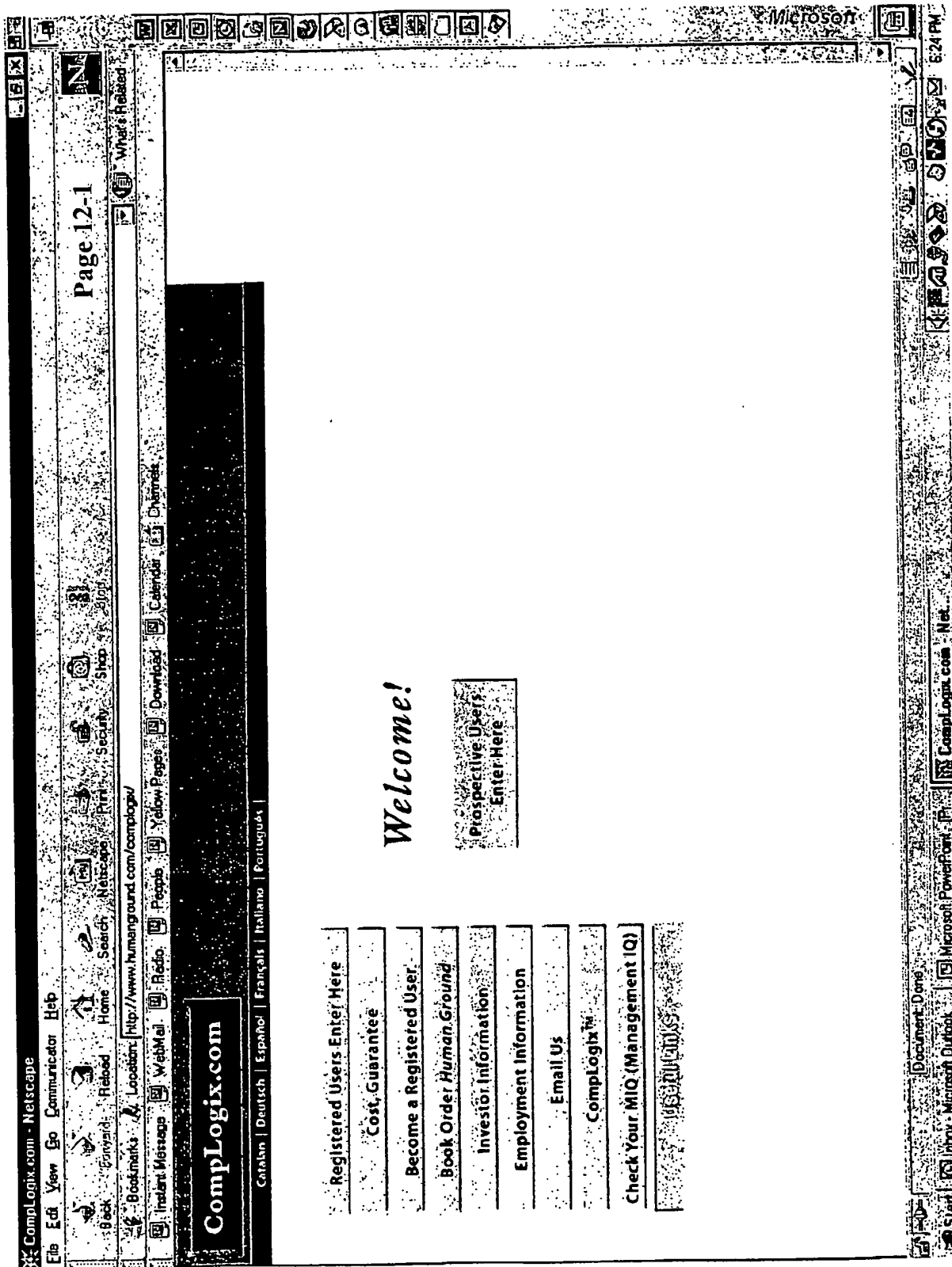
- Money motivates everyone.
- Money is the primary motivator of most people
- "Paternalism" will always be a valid management style in very small organizations
- Most organizations' employee/manager relations are on solid ground
- The greatest problem with performance evaluations is that they are ineffective
- Treating a subordinate as a "partner" like employee empowerment, is dangerous and can weaken the organization
- Most of the time, when a manager says "teamwork" he means "clockwork."
- Not all goals can be quantified, therefore achievement usually requires interpretation.
- There is no effective way to measure a person's skill at managing others.
- An exit interview is a highly valuable management tool.

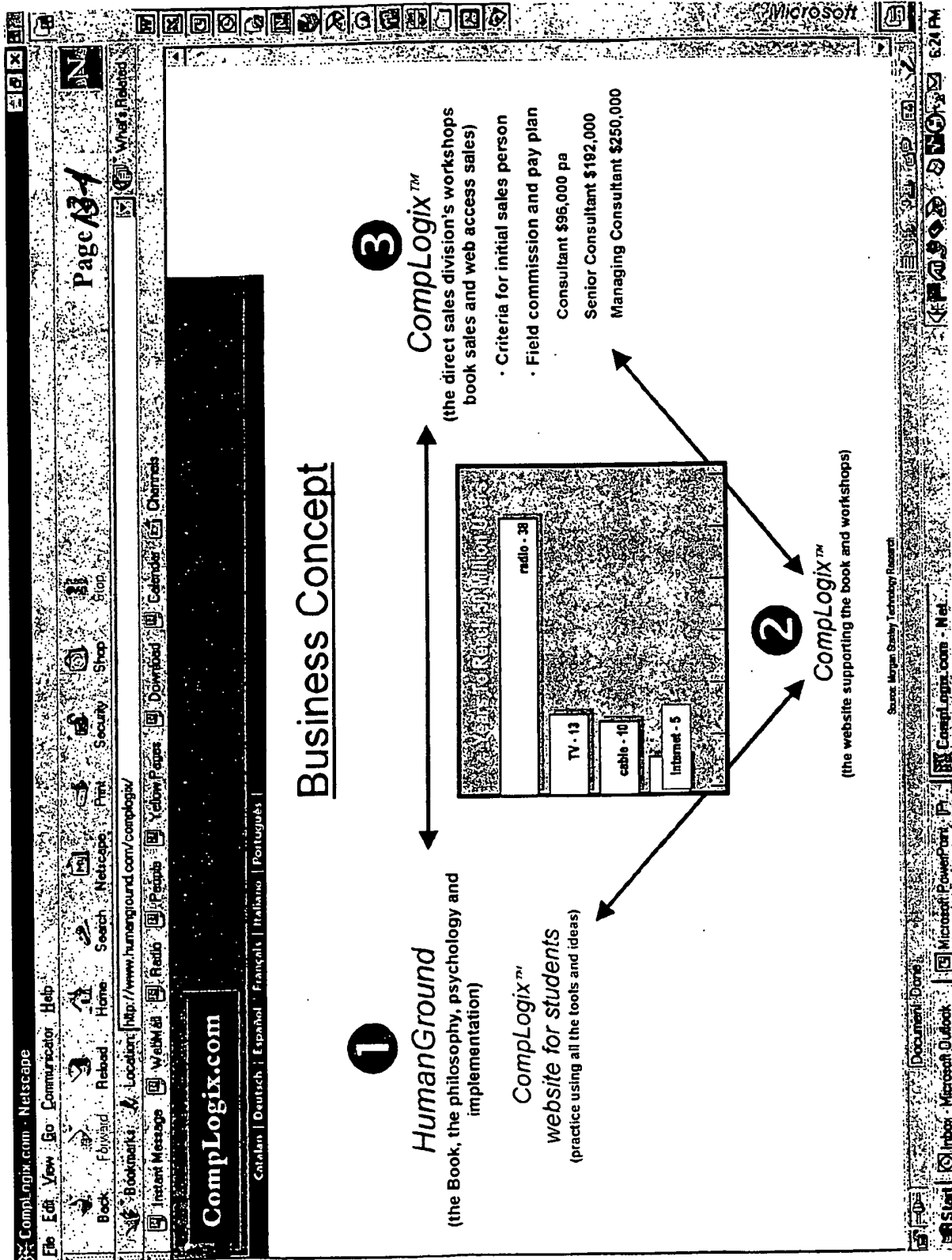
Your MIQ: **15**

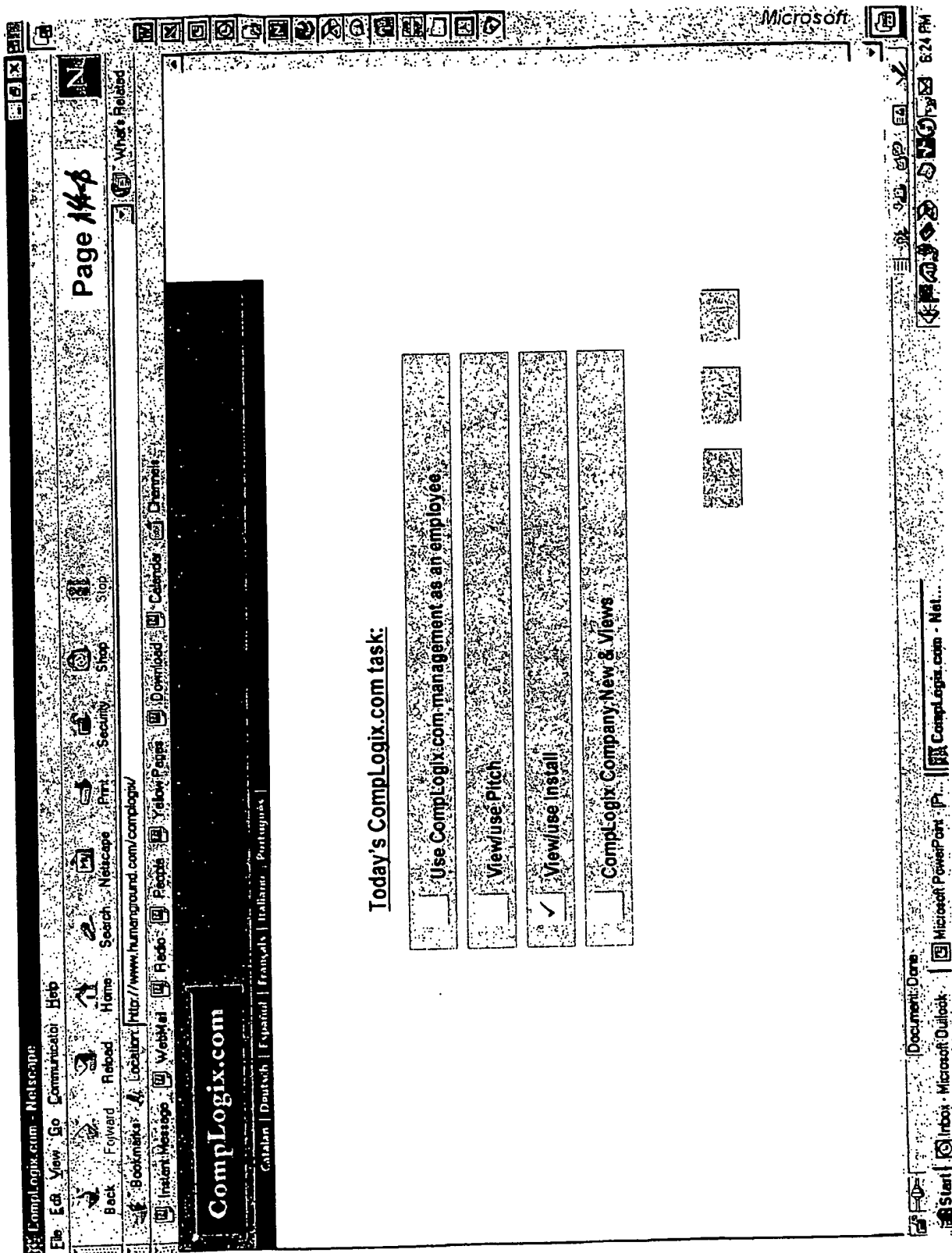
Next Exit

True is True
Everyone can use extra money and therefore everyone is motivated by it.
The question is
to what degree?









INTERNATIONAL SEARCH REPORT

International application No.

PCT/US00/29660

A. CLASSIFICATION OF SUBJECT MATTER

IPC(7) : G06F 17/60

US CL : 705/10

According to International Patent Classification (IPC) or to both national classification and IPC

B. FIELDS SEARCHED

Minimum documentation searched (classification system followed by classification symbols)

U.S. : 705/1, 10, 1; 434/107, 353

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Electronic data base consulted during the international search (name of data base and, where practicable, search terms used)
EAST (US Patent Database); DIALOG

C. DOCUMENTS CONSIDERED TO BE RELEVANT

Category *	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
X	US 5,727,950 A (COOK et al) 17 March 1998 (17.03.1998), abstract, column 5, lines 12-30, column 7, lines 59-67.	15
A	P&Q Review! Productivity and Quality Performance Evaluation. User Manual. Verison 2. June 1995.	1-16.

☐ Further documents are listed in the continuation of Box C.

☐ See patent family annex.

* Special categories of cited documents:	
A document defining the general state of the art which is not considered to be of particular relevance	*T* later document published after the international filing date or priority date and not in conflict with the application but cited to understand the principle or theory underlying the invention
E earlier application or patent published on or after the international filing date	*X* document of particular relevance; the claimed invention cannot be considered novel or cannot be considered to involve an inventive step when the document is taken alone
L document which may throw doubts on priority claim(s) or which is cited to establish the publication date of another citation or other special reason (as specified)	*Y* document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art
O document referring to an oral disclosure, use, exhibition or other means	
P document published prior to the international filing date but later than the priority date claimed	*&* document member of the same patent family

Date of the actual completion of the international search

27 January 2001 (27.01.2001)

Date of mailing of the international search report

21 MAR 2001

Name and mailing address of the ISA/US

Commissioner of Patents and Trademarks
Box PCT
Washington, D.C. 20231

Facsimile No. (703)305-3230

Authorized officer

Tariq Hafiz

Telephone No. (703)305-3900

Peggy Hanoud

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